English for academic study:

Fully revised

# Extended Writing & Research Skills

Course Book

Joan McCormack and John Slaght

University of Reading

Garnet EDUCATION

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CALS
Centre for Applied Language Studies

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# Credits

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| | Topic | Tasks |
|---|---|---|
| 6 | • Introductions, conclusions and definitions | • Features of introductions<br>• Analyzing your introduction<br>• The language of introductions<br>• Identifying the thesis statement<br>• Features of conclusions<br>• Analyzing your conclusion<br>• The language of conclusions<br>• Features of definitions<br>• Unit Summary |
| 7 | • Incorporating data and illustrations | • The purpose of data<br>• The language used for incorporating data<br>• Data commentary<br>• The language of data commentary<br>• Practice data commentary<br>• Unit Summary |
| 8 | • Preparing for conference presentations and editing your work | • Features of abstracts<br>• Conference abstracts<br>• Preparing an oral presentation<br>• Preparing a poster presentation<br>• Unit Summary |

# Acknowledgements

The creation of these materials stemmed from the need to help international students develop the study skills necessary to function effectively on academic courses in a university context. The rationale behind the material is that students need to develop the confidence and competence to become autonomous learners in order to successfully carry out research and complete assignments, such as extended pieces of written work or oral presentations.

The development of these materials has been a collaborative effort which goes far beyond the collaboration between the authors. The material has evolved over several years of pre-sessional teaching at the Centre for Applied Language Studies at the University of Reading. There have been significant additions from a number of teachers, who have either contributed ideas or given extensive feedback on the materials. The number of teachers involved is too large for us to mention each one individually, but they are all fully appreciated.

In something like their present form, the materials have been trialled on successive pre-sessional courses at the University of Reading since 2001. This trialling has involved almost a thousand students, and they too have provided feedback in terms of course evaluation, as well as with their responses to the tasks in the programme. We very much appreciate the contribution of students whose work has been adapted and incorporated into the materials.

We would particularly like to thank Jill Riley for her meticulous editing and typing up of the materials and Corinne Boz and Bruce Howell for their contributions.

Particular mention should also be made of our colleague Sarah Brewer, for her ideas selflessly shared, her knowledge of referencing and academic conventions and her patient and meticulous editing – not to mention the seven years she has spent teaching and commenting upon the contents of this book.

Finally, we would like to acknowledge the contribution of Mansoor Alhagbani, who gave us permission to publish his extended essay, *To what extent should insider dealing be regulated, and how can this be done effectively?*, on pages 109–118.

Joan McCormack and John Slaght, authors, April 2009

**Referencing**

The system of referencing in the book is that of the APA (American Psychological Association). See a brief summary in Appendix 5.

A number of the sources included have used different systems; these have been reproduced in the original form. It is worth pointing this out to students, and ensuring they follow the APA system consistently in their own writing of projects.

However, individual institutions or groups may well have their own system. It is important to be systematic and meticulous in the choice and use of the system decided on. Obviously it is not possible to move between different systems.

# Introduction

*EAS Extended Writing & Research Skills* has been designed with the aims of helping you to:

- improve your extended writing and research skills;
- develop an independent approach to extended writing and research.

The purposes of this textbook are to support you in developing your extended writing and research skills and to encourage the development of an independent approach to extended writing and research. It is assumed that you will be working on the development and consolidation of core academic written language skills on other parts of your course, and part of the aim of these materials is to put such skills into practice.

The book is designed around a ten-week course, during which you are expected to write two projects: a guided project in the first four weeks, and a project in your own academic subject over the remaining six weeks. You will be working on the projects at the same time as you carry out the tasks in each unit of this book.

There is a suggested route through the materials for a shorter course of, for example, six weeks. In this case, you are encouraged to study the materials that are not covered on your course, independently.

The course is designed so that for Project 1, the whole group will be working on the same essay title, which is provided in the book along with appropriate source material. Your teacher will support you in planning and writing this project, which will enable you to develop the skills you need for extended academic writing.

Alternatively, especially on a short course, your teacher might choose to go straight to Project 2 (see below).

In academic life at university, students are expected to work independently, and in Project 2 this aspect is emphasized. With the second project, you have to choose your own title and decide on the focus of the project. Although you will need to find your own resources, you will, of course, be supported in class and in tutorials during this period. For example, you will be able to 'negotiate' a title in collaboration with your tutor and make changes to your project after discussing your work with her/him at various stages of the project.

### The differences between Project 1 and Project 2

| | **Project 1** | **Project 2** |
|---|---|---|
| **Title** | Given in textbook | Your choice of topic in your subject area |
| **Length** | About 1,200 words | 2,000–3,000 words |
| **Resources** | Mostly provided in the book | You need to find your own |
| **Support** | A lot of support provided in the book and by your teacher | Working more independently, with tutorials |

This course will help you to develop a number of skills while writing your projects. These include the following:

- brainstorming and planning your work;
- establishing a specific focus and developing your ideas;
- finding sources of information from books, journals and the Internet;
- selecting information appropriate to your needs;
- incorporating ideas and information into your text through paraphrasing/summarizing and synthesizing, while avoiding plagiarism;
- *evaluating your sources and selecting the most relevant and appropriate;*
- developing your critical thinking skills;
- learning about UK academic conventions for referencing and compiling a bibliography;
- discussing your work with your tutor and your peers;
- giving a presentation about your work.

One aspect of extended writing that students often find particularly difficult is expressing their ideas in their own words; that is to say, establishing their own voice. This course will explore ways to help you achieve this, in particular by encouraging a system that ensures you avoid lifting sections directly from the original sources and copying them into your own extended writing projects. Understanding how to avoid plagiarism and develop your own voice is essential in academic writing. Apart from the fact that plagiarism is considered serious misconduct, expressing your own ideas illustrates that you have evaluated your sources and understood their full meaning. It also demonstrates that the ideas and information that you do quote directly have been chosen for a particularly significant reason.

Additional interactive activities to accompany these materials can be found online, at www.englishforacademicstudy.com.

# 1 Introduction to the skills of extended writing and research

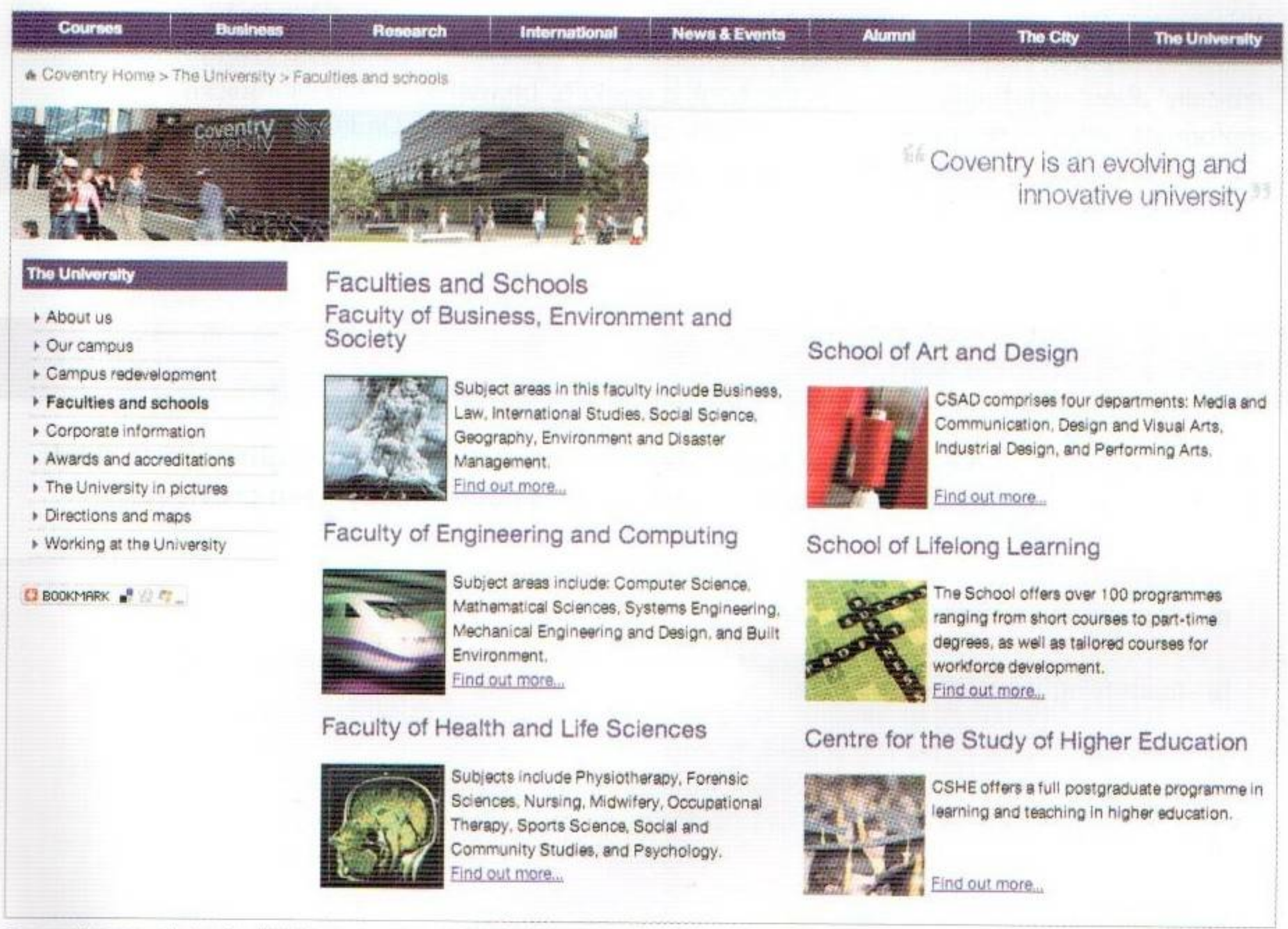
In this unit you will:

- be introduced to extended writing and what it involves;
- find out about writing a project.

## Introduction

### Academic disciplines on the typical university campus

There are a number of schools (or faculties) on university campuses, and within these, there are departments and units. This page from the University of Coventry's website gives an example of how universities are usually structured.




**Source:** Coventry University. (2009). Retrieved April 27, 2009, from Coventry University website: http://www.coventry.ac.uk/University/Pages/Facultiesandschools.aspx

Students usually have to produce a specific type of written assignment, on which they are assessed, and this normally differs according to the requirements of their academic department. The type of writing that students have to produce also depends on the level of study: whether *undergraduate, postgraduate* or *doctoral (PhD)*.

## Extended writing at university: why do students write?

Students write for a number of purposes, according to the particular requirements of their course. In many cases, the topic or title will be predetermined by the lecturer and may require the reading of recommended texts. At other times – for example, when writing a thesis or dissertation – students have to choose their own titles. Students will receive guidelines and support from a supervisor, but on the whole, they are expected to work independently at this level.

The reasons why students carry out extended academic writing activities may include the following:

- to develop and express their ideas;
- to provide evidence to support their ideas;
- to show they can dispute or support existing theories (which involves demonstrating their *critical thinking* ability);
- to display knowledge.

The type of writing required is determined by the *purpose* of the writing.

**Key research and writing skills:** Critical thinking is an important feature of academic study. Imagine, for example, that you have borrowed a book from the university library that has to be returned the following day, but it contains important information you need for an essay. You will have to think 'critically' about which information in the book is going to be useful, so you can quickly take appropriate notes or photocopies, i.e., use your critical thinking skills. Understanding what is relevant is one example of the ability to think critically. Another example of critical thinking is recognizing the writer's *purpose*, or reason for writing a text, e.g., whether it is to inform, to persuade, or to support or refute a viewpoint.

## Task 1: Critical thinking

**In the box below, make a list of at least three examples of what you might need to think about critically when you are studying. Two examples have already been provided.**

**a)** Recognizing relevant information

**b)** Identifying the writer's purpose

**c)** _____

**d)** _____

**e)** _____

## Task 2: What do students in higher education write?

You are going to brainstorm some ideas about the kind of writing students have to do at university. This involves writing down as many ideas as you can about the topic. You are going to do this very quickly, within a time limit, so don't be concerned about the accuracy of your grammar or spelling.

**2.1 Work with a partner. Brainstorm the kinds of writing students have to do at university.**

Note your ideas in the box below, without worrying about how you write, the order of ideas, etc. One idea has been written for you as an example.

**WHAT STUDENTS HAVE TO WRITE AT UNIVERSITY**

- Reports of experiments
- _____
- _____
- _____
- _____
- _____

**2.2 Now read the explanation below of the types of writing expected of students in higher education. Compare them with your own ideas.**

University students are often asked to write *essays*. These may be as short as 600 words, especially during examinations. However, undergraduate students as well as postgraduate students are also frequently required to write *extended essays*. A typical length for an extended essay is 2,500–3,000 words. We sometimes refer to these extended essays as *projects*.

Towards the end of their period of study, most students will be expected to write either a *thesis* or a *dissertation*. Collins Cobuild Advanced Learner's English Dictionary defines a dissertation as "a long piece of writing based on the writer's own ideas and research as part of a university degree, especially a higher degree such as a PhD". In the United Kingdom and Ireland, a dissertation is often written for a master's-level degree.

According to the University of London website, a thesis is the:

> acquisition and dissemination of new knowledge. In order to demonstrate this the author must demonstrate an understanding of what the relevant state of the art is and what are the strengths and weaknesses of this situation. For someone's work to be knowledge there must be a demonstration that suitable and systematic methods were used to evaluate the chosen hypothesis.
>
> http://www.cs.ucl.ac.uk/staff/c.clack/phd.html

Not all students are required to write traditional-style essays. For example, in the Engineering Department of a university, students will often be expected to write *reports* on projects they have been working on during their course.

In certain academic disciplines, such as Applied Linguistics, Education or Sociology, students may be required to write a *case study*. A good example of a case study might be the "study of speech, writing, or language use of one person, either at one point in time or over a period of time, e.g., a child over a period of one year" (Richards, Platt & Weber, 1985, p. 36). A student in an Applied Linguistics Department would probably write a case study like this.

Students also have to write *notes*: from written sources, or when attending a lecture, seminar or tutorial. Some students *annotate* lecture handouts, either by highlighting key points or by writing notes/comments in the margins of the text, which may be useful later.

**2.3** Discuss with a partner what types of writing you expect to do on your university courses in the future.

## Task 3: Types of writing

**Complete the table below to clarify your understanding of the types of writing described on page 11.**

| Type of writing | Type of student | Explanation |
|---|---|---|
| essay for an examination | | traditional 600–1,000-word text written during an exam |
| non-examination essay | | written work submitted as part of the course requirement during term time – typically 600–6,000 words |
| report | | |
| dissertation | | |
| thesis | | |
| case study | | |
| notes | | |
| annotations | | |

### Writing as a common process

Whatever form of extended writing students are expected to do, the process will usually involve the following steps:

- gathering information from various sources;
- organizing this information so that it appropriately answers the needs of the task that the writer has to complete;
- planning the text;
- drafting and redrafting the text until it communicates the information and ideas fully and clearly.

**Study tip**

When carrying out research, you need to:

- learn to work independently;
- find the information yourself;
- take personal responsibility for your writing;
- make sure you can explain your ideas to others.

## Types of assessment

The writing of reports, case studies, dissertations and theses forms part of the assessment process in most academic disciplines in universities. Another means of assessment is *oral presentations*. Presentations are normally given as part of a study project. For example, a student writing a report might give a presentation in order to 'present' her/his report in a clear, concise way. Oral presentations can be given by an individual student, or they can be group presentations.

Another form of presentation is the *poster presentation*. In this case, the student prepares a visual display outlining the work or project s/he has been involved in. A poster presentation will normally be given during a student conference. Students display their work, and participants and visitors to the conference are invited to look at the display and ask the author of the poster questions about the process or information they can see. At the same time, other students will be giving oral presentations at the conference. You will do further work on presentations later in this book (see Unit 8).

Apart from the methods of written and oral assessment mentioned above, of course, students will probably have to take exams at the end of term and/or the end of year, as well as at the end of their university studies, when they take their final examinations.

## Writing projects

You will do most of the extended writing for this course independently, outside the classroom. Any writing that goes on in the classroom will normally be for editing purposes, when you will have an opportunity to consult your tutor and redraft your work accordingly. You will be expected to follow a process writing approach (see *English for academic studies: Writing*, Course Book pages 7–8, for a full explanation of this term). This approach includes editing your work, submitting your first draft and redrafting the project after your tutor has given you feedback.

This course book is designed to be used for applying the skills and strategies that you have already studied and developed in more general writing and reading classes, i.e., skills such as skimming and scanning, structuring an essay and writing a conclusion.

You might also have the opportunity to take part in one-to-one tutorials with your tutor, in order to discuss the first and subsequent drafts of any extended writing that you are working on.

## Task 4: Participating in a tutorial

**Write down three aspects of your project that you might expect to discuss with your tutor.**

a) _____

b) _____

c) _____

You will be expected to go on redrafting and revising the content of your text in order to improve it, as long as you are able to submit your final draft before any submission deadline. The process you go through while writing the project is just as important as the final product and the final grade. Writing your project gives you the opportunity to practise the academic skills and conventions you have been learning and developing on all components of your pre-sessional course.

### Guided Projects 1 and 2

This course is based around a guided project on the topic of sustainable development. For this project, you will be given certain 'core' texts to consult. However, you will have the opportunity to carry out some independent research, because you can select two extra texts of your own choice from books, journals or online sources. You will need to provide hard copies of these sources for your tutor, and, of course, they must be sources written in English.

The aim of this guided project is to give you practice in finding appropriate information. Although a range of texts are available, you will need to read *selectively* in order to find information that is relevant to the task title. You will also practise taking notes from these sources, and using them as the basis for summarizing ideas and synthesizing information into your project. In addition, you will be given advice on how to avoid plagiarism and how to acknowledge the origin of your information.

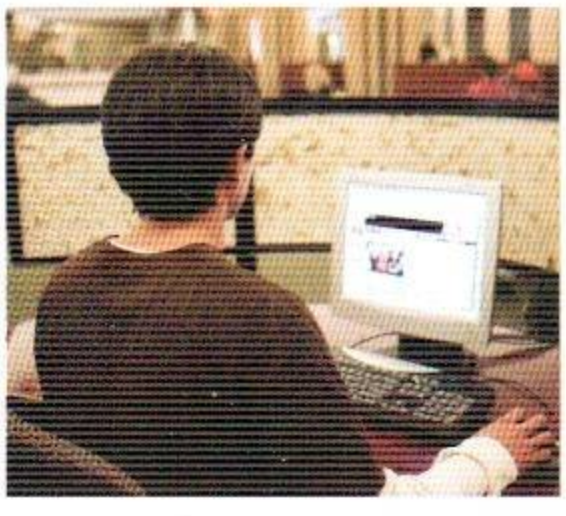
**Study tip**

While working on projects, you should make good use of any tutorial sessions.

- Prepare questions before the tutorial.
- When working on a project in your subject area, be sure that you have a thorough knowledge of the topic you are writing about.

The guided project should be considered as practice for a second project related to your own subject area. For this second project, you should make all the decisions about the subject, topic and title, and you will carry out the research independently (including the search for appropriate sources).

**Note:** Your teacher might decide not to do Project 1 and simply make use of the practice activities to develop the necessary skills for completing Project 2, on a topic related to your own field of study.



## Task 5: Analyzing the task

Before you begin any task, it is important to analyze carefully what it requires you to do. You will then have a very clear idea of your purpose for writing. Consider the following project title:

***To what extent can the problems of urbanization be met by a policy of sustainable development?***

**Analyze the project title and highlight the key words and phrases. Then discuss the following with a partner.**

**a)** How is the title framed, e.g., statement/question/heading?

**b)** What does the title ask you to do?

## Task 6: The stages of writing a project

There are three stages in producing an extended essay or project: planning, researching and writing up. In each of these stages, there are a number of smaller steps.

**6.1** **Read steps a–p, below. Then write them under the appropriate stage headings on page 16, *Planning, Researching or Writing up*, in the most appropriate order.**

Write the steps in full, not just the letters. Note that one step can be placed in two stages.

**a)** Read the first draft.

**b)** Edit the draft – decide objectively whether your ideas have been expressed clearly.

**c)** Think of a working title for the project. ✓

**d)** Search for relevant journals/books/information in the library and on the Internet.

**e)** Write down the details of your sources.

**f)** Decide if you need to do more reading.

**g)** Write the contents page, bibliography, title page and abstract. ✓

**h)** Arrange a tutorial with your tutor.

**i)** Do some reading.

**j)** Decide on a topic.

**k)** Write the first complete draft.

**l)** Highlight/take notes of relevant information. ✓

**m)** Plan the contents in detail.

**n)** Work on establishing a clear focus.

**o)** Make a rough outline plan of your ideas.

**p)** Check that sources are available/accessible.

**Planning**

1. _____
2. _____
3. Think of a working title for the project.
4. _____
5. _____
6. _____

**Researching**

1. _____
2. _____
3. Highlight/take notes of relevant information.
4. _____
5. _____

**Writing up**

1. _____
2. _____
3. _____
4. _____
5. Write the contents page, bibliography, title page and abstract.

**6.2** **Now discuss your answer with a partner. There is more than one possible order.**

## Task 7: Starting Project 1

In Task 5, you analyzed the title of the project *To what extent can the problems of urbanization be met by a policy of sustainable development?* You are now going to work on this project by answering a number of questions, which are grouped under three broad headings: *Introduction*, *Main body* and *Conclusion*.

**Study tip**

It is always useful to take time to ask yourself questions about an essay title, as a way of both analyzing it and brainstorming ideas. This also helps you to organize the structure of your writing.

**7.1 Read questions a–k, below, carefully and think of any possible answers.**

### Introduction

**a)** What is 'sustainable development'? (Definition)

**b)** What is 'urbanization'? (Definition)

**c)** What are the problems of urbanization? (Background information)

**d)** What policies of sustainable development exist or could be introduced? (Background information)

**e)** To what extent do you *think* sustainable development can solve the problems?

**Note:** The expression *to what extent* allows you to give your opinion about the likely success of sustainable development policies. Your position (opinion) on this question will help form your *thesis* – that is the main argument you will present in your project.

### Main body

**f)** What specific problems are related to a lack of urban space? What evidence can you find for this?

**g)** What specific problems are related to urban transport? What evidence can you find for this?

**h)** What are the possible solutions to the problems outlined above?

**i)** What evidence can you find to suggest that a policy of sustainable development can be successful?

### Conclusion

**j)** Based on the evidence you have presented above, to what extent can a policy of sustainable development meet the current urban problems related to a lack of space and transport?

**k)** Does the evidence you put together in the 'main body' support the thesis you introduced in your introduction?

**7.2 Brainstorm some ideas on the above questions in groups.**

Write your ideas in the appropriate boxes on page 18. You need only write in note form.

At the moment, you are only being asked to guess what the answers might be. After this, you will do some reading to find out whether your guesses were appropriate. You will also be reading to find other ideas about the topic. This reading stage is one of the most important parts of your work, because you will be looking for evidence to support your ideas.

## Introduction

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____

## Main body

1. Lack of playground facilities for children.
2. _____
3. _____
4. _____
5. _____
6. _____

## Conclusion

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____

## Unit Summary

In this unit, you have been introduced to the basic concept of extended writing and the types of extended writing that you may be required to produce. You have discovered what a project involves and looked at the various stages of good project writing.

**1** **Using the verbs in the box below, complete these possible reasons for writing an extended project.**

| dispute | develop | display | provide |
|---|---|---|---|

**a)** to show that you can express and _____ ideas

**b)** to show that you can _____ evidence to support ideas

**c)** to show that you can _____ or support existing theories (which demonstrates critical thinking ability)

**d)** to _____ knowledge

**2** **Look at the following examples of critical thinking. Mark each with either G, for *this is something I am quite good at*, or NG, for *this is something I am not so good at and I need to practise*.**

**a)** recognizing what is relevant and what is not relevant ____

**b)** identifying the writer's purpose ____

**c)** assessing the writer's argument ____

**d)** comparing and evaluating issues ____

**e)** evaluating the credibility of the writer's sources ____

**3** **Tick (✓) the types of extended writing that you need to practise and improve to be successful on your course.**

**a)** essay for an exam ☐

**b)** non-examination essay ☐

**c)** dissertation ☐

**d)** thesis ☐

**e)** report ☐

**f)** case study ☐

**4** **Look at the three stages involved in producing an extended written text, below. For each stage, write two of the steps you would need to carry out.**

The first one has been done for you as an example.

**a)** planning make a rough outline plan of your ideas

**b)** researching

**c)** writing up

**5** **Think about the project you started in Unit 1 and answer the questions below.**

**a)** What did you enjoy?

**b)** What did you find quite easy?

**c)** What did you find quite difficult?

For web resources relevant to this unit, see:
**www.englishforacademicstudy.com/student/ewrs/links**

These weblinks will provide you with ideas on how to approach different stages of the writing process, as well as links to sources on sustainable development.

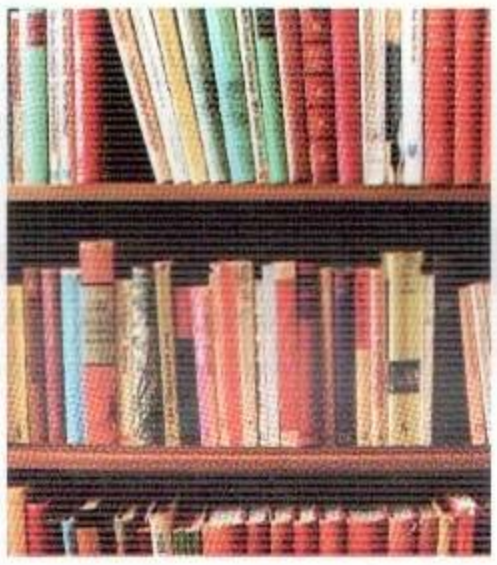
# 2 Using evidence to support your ideas

In this unit you will:

- discuss the importance of providing evidence in academic writing;
- learn different methods of incorporating sources;
- practise summarizing information.

## Introduction

### Using supporting evidence



It is part of Western academic convention that any claim made in writing, e.g., an opinion or generalization, is supported by evidence. You need to show some *proof* that what you are saying is correct. You need to support any statements or points you make with *evidence*. This gives your work more *academic weight*. This is a very important aspect of Western academic convention.

Using the ideas of other people in your text and acknowledging them is an essential part of academic writing. This means referring to them twice, within the text itself and in a bibliography at the end.

In academic writing, and especially in the early stages, students are *not* expected to write their own original ideas. In fact, university departments often require students to produce written work in order to demonstrate that:

- they have read, understood and evaluated some of the literature in their field;
- they can synthesize ideas from more than one source;
- they can select appropriate academic sources to support their point of view, or perspective.

**Study tip**

Reading, understanding and evaluating literature in your field involves the idea of critical thinking that was mentioned in Unit 1. This will come up at various stages in this book, as it underlies the expectations of tertiary level education.

### Reading list

To carry out your first project successfully, you should make use of the reading list below. The printed sources are available in Appendix 4 on page 123.

## Reading list


- Adams, W.M. (1999). Sustainability. In P. Cloke, P. Crang & M. Goodwin (Eds.), *Introducing human geographies* (pp. 125–130). London: Arnold.
- Bilham-Boult, A., Blades, H., Hancock, J., Keeling, W. & Ridout, M. (1999). *People, places and themes* (pp. 202–205; p. 208). Oxford: Heinemann.
- Chaffey, J. (1994). The challenge of urbanisation. In M. Naish & S. Warn (Eds.), *Core geography* (pp. 138–146). London: Longman.
- Elliot, J.A. (1999). *An introduction to sustainable development*. London: Routledge.
- Newman, P. (1999). Transport: reducing automobile dependence. In D. Satterthwaite (Ed.), *The Earthscan reader in sustainable cities* (pp. 67–92). London: Earthscan Publications.
- Thisdell, D. (1993). Can LA kick the car habit? *New Scientist*, *138*(1877), 24–29.

## Task 1: Selective reading

In Task 5 of Unit 1 (page 15), you analyzed the title of the project. The next stage is to look at sources relevant to your title.

**1.1 With a partner, discuss the following questions.**

**a)** Why are you going to read the sources on the reading list; in other words, what is your *purpose* for reading them?

**b)** How are you going to read them and what reading strategies might you use?

**c)** What are you going to do as you read?

These questions help you to think critically as you approach your reading, i.e., you are not passively accepting any texts that you are presented with, but asking yourself questions as you read.

**1.2 Study the table below, showing reasons why you might want to read a text. Indicate how important you think each reason is by placing a tick (✓) in the appropriate column 1–5, where 1 = very important reason.**

| Reasons for reading a text | 1 | 2 | 3 | 4 | 5 |
|---|---|---|---|---|---|
| It's on the reading list supplied by your teacher | | | | | |
| To compare with other texts | | | | | |
| Advice from tutor/lecturer/teacher | | | | | |
| Relevant to my purpose | | | | | |
| Well-known author | | | | | |
| To make notes | | | | | |
| To develop a line of enquiry | | | | | |
| To refute an argument | | | | | |
| To write everything down that's in the text | | | | | |
| Written by an expert in the field | | | | | |
| Very recently published text | | | | | |
| Cited in other sources | | | | | |
| To expand knowledge | | | | | |

**Study tip**

It is important to develop the *skill* of selective reading at this stage, as you will be expected to read hundreds of pages per week during your academic course. When you begin your studies, you may be shocked by the amount of reading you have to do. One strategy for dealing with this heavy reading load is to become good at selective reading.

One of the most important things to remember about writing an academic assignment is that you are expected to frame your ideas *in your own terms*; your reader is interested in your point of view. This is true whether you are preparing to write a long dissertation or a simple summary for an oral presentation. However, you must support your point of view with evidence from the *literature* – in the case of Project 1, the sources you have read from the reading list on page 21 – or from your *fieldwork*, e.g., collecting data, or from experiments. By supporting your opinion with ideas and information from the literature, you are strengthening your viewpoint and therefore providing a more compelling argument. Such evidence is expected in academic writing.

Your purpose in reading the sources from the reading list on page 21 is to find information (or evidence) that is relevant to your idea (or *thesis*) about the topic. It is important to remember that not all of the information in the sources you have will be relevant. You will therefore have to read *selectively* in order to identify the relevant information.

**1.3** **Look at the different ways you might want to read a text in the table below. Indicate how important you think each reading method is by placing a tick (✓) in the appropriate column 1–5, where 1 = very important.**

| How to read a text | 1 | 2 | 3 | 4 | 5 |
|---|---|---|---|---|---|
| Read carefully in order to understand everything | | | | | |
| Look up the meaning of all the words you don't understand | | | | | |
| Check the contents page of the book or journal before starting to read | | | | | |
| Summarize every chapter or section | | | | | |
| Only read the sections which seem relevant to your needs | | | | | |
| Make a note of other sources mentioned in your reading and their reference details | | | | | |
| Skim the whole text, note the most relevant sections, then read those sections more carefully | | | | | |
| Read the introduction and conclusion first | | | | | |
| Browse the text randomly for information | | | | | |
| Read as quickly as possible | | | | | |
| Only read the paragraph leaders | | | | | |
| Annotate or highlight key ideas and words in the text | | | | | |
| Make notes in the margin of the text | | | | | |

Before you look at the texts in the reading list, you will see some examples of how evidence is incorporated into academic writing and carry out some practice tasks.

## Task 2: Incorporating evidence into academic work

**2.1** **Look at examples a and b below. Which statement would you take more seriously and why?**

**a)** The number of tourists has increased considerably in the last year.

**b)** The number of tourists has increased by 10 per cent since last year, according to the most recent government report on the economy (UK Government Statistics, 2007).

**2.2** **Now look at the following examples of how evidence is used to support a point. Underline the point being supported and circle the evidence given.**

**a)** Any discussion of financial markets must begin with a definition of what they are: "A financial market is the place or mechanism whereby financial assets are exchanged and prices of these assets are set" (Campbell, 2003, p. 47).

**b)** According to Wang (2001), education is the key aspect underlying the successful economic development in a society.

**c)** Djabri states that operations research is the application of the methods of science to complex problems (Djabri, 2005).

**d)** As Sloman (2006) has demonstrated, there are two main methods of measuring unemployment.

**e)** This antibiotic has an immediate effect on the illness (Braine, 2007).

You can incorporate evidence into academic writing in three ways.

- You can **summarize** the content of a text: a summary is a shorter version of a text, which concentrates on the main information without giving all the details or explanations, so it has a 'general' purpose. You must acknowledge the writer, and you should not include any ideas that are not expressed in the original (see examples b, c, d and e in Ex 2.2). This method of incorporating ideas is the most commonly used.
- You can **paraphrase** the writer's ideas: a paraphrase is a rewritten version of a writer's ideas and usually relates to a 'specific' point that the writer has made. You should use your own words as much as possible. In academic writing, this may not necessarily be a shorter version of the original and, in fact, it may be very difficult to make it shorter without losing the original meaning. Again, it is important to acknowledge the writer and not to include any information or interpretation which is different from the original.
- You can use **direct quotations**: this means you use the exact words of the writer, using inverted commas or italics. You must acknowledge the writer (see example a in Ex 2.2). Quotations are mostly used in essays and journal articles. However, an essay full of direct quotations may detract from your viewpoint and make it difficult for the reader to follow what you want to say. Direct quotations are used less frequently in books, because the authors often want to express their own viewpoint rather than to reiterate the ideas or opinions of others.

In most academic writing, the incorporation of evidence is done by using a mixture of the above techniques, but with limited and carefully selected use. All three – summaries, paraphrases and direct quotations – are used by the writer in academic essays as evidence of detailed knowledge. You should also attempt to use them to demonstrate your understanding of some of the most important features of academic writing.

You might summarize ideas generally or paraphrase more specific points, while acknowledging the sources, and use a direct quotation if this seems to encapsulate exactly the point you wish to make. You might choose to refer directly to your source (see examples b, c and d in Ex 2.2), where the authors are named within the sentence, using appropriate language. Alternatively, you might simply refer indirectly to the source by putting the name and date after your statement (see example e in Ex 2.2).

Students often ask why they should paraphrase when it is much easier simply to quote directly from the original. The answer is that it is an academic convention not to constantly use direct quotations. Another good reason for paraphrasing is that it shows that the writer has clearly understood the point being made in the original text. This is less easy to determine if too many direct quotations are used.

## Task 3: Referencing

In this task, you are going to practise identifying different ways of referencing.

**3.1** **Read the extract on page 25 from the text *Environmental problems and management* by Andrew Jordan & Tim O'Riordan (1999), and highlight the references.**

# Environmental problems and management

## The origins of environmental policy

Recognition of the need to both transform and adjust to nature is a fundamental aspect of the human condition. While we may think of 'the environment' as a modern political issue that gained popular appeal in the 1960s, the roots of environmentalist thinking stretch back far into the past (O'Riordan, 1976). The natural environment provides humanity with the material resources for economic growth and consumer satisfaction. But throughout history there have always been social critics and philosophers who have felt that humans also need nature for spiritual nourishment and aesthetic satisfaction. John Muir, the redoubtable founder of the Sierra Club in the USA, felt that without wild places to go to humanity was lost:

> Thousands of tired, nerve-shaken over-civilized people are beginning to find out that going to the mountains is going home; that wilderness is a necessity and that mountain parks and reservations are fountains not only of timber and irrigating rivers, but as fountains of life. Awakening from the stupefying effects of over-industry and the deadly apathy of luxury, they are trying as best they can to mix their own little ongoings with those of Nature, and to get rid of rust and disease ... some are washing off sins and cobwebs of the devil's spinning in all-day storms on mountains. (quoted in Pepper, 1984, p. 33)

Environmental protection is justified in remarkably similar terms today. What is dramatically different is the *extent* of popular concern. The critical question which needs to be asked is *why did modern environmentalism blossom as a broad social movement spanning different continents in the late 1960s and not before?* There is strong evidence that environmental problems like acidification and pesticide pollution materially worsened and became more widespread in the public mind in the 1960s and 1970s. The American sociologist Ronald Inglehart (1977), however, believes that we also have to look to society for an explanation. On the basis of careful and intensive public opinion analysis he argues that modern environmentalism is the visible expression of a set of 'new political' values held by a generation of 'post-materialists' raised in the wealthy welfare states of the West. This liberated class no longer had to toil to supply their material needs and set out to satisfy what the psychologist Maslow (1970) terms its 'higher order' requirements like peace, tranquillity, intellectual and aesthetic satisfaction. This was surely a 'post-materialist' sensibility, but at first it was confined to a vociferous minority that tried to push their values onto the majority who steadfastly regarded themselves more as consumers than as citizens.

Other commentators, however, highlight the tendency for environmental concern to exhibit a cyclical pattern over time, with particularly pronounced peaks in the late 1960s and late 1980s. Closer scrutiny reveals that these short-term 'pulses' coincided with periods of economic growth and social instability, which at first blush seems consistent with Inglehart's thesis. Other sociologists have also observed that materially richer and better educated sections of society tend to give much higher priority to environmental protection than poorer ones, with the highest rates among those working in the 'non-productive' sectors of the economy, such as education, health and social care (Cotgrove and Duff, 1980). Conversely, concern tends to tail off during periods of economic recession (Downs, 1972), and is not normally as pronounced in poorer sections of Western society or in developing countries. The birth of the modern environmental movement in the late 1960s certainly coincided with a period of economic prosperity and societal introspection. Whether this led to or was caused by the accumulating evidence of environmental decay is open to interpretation.

**Source:** Jordan, A. & O'Riordan, T. (1999). Environmental problems and management. In P. Cloke, P. Crang & M. Goodwin (Eds.), *Introducing human geographies* (pp. 133–140). London: Arnold.

**3.2** **Decide whether the references in the text on page 25 are paraphrases/summaries or direct quotations.**

Pay attention to the kind of language used. Complete columns 1 and 2 in the table below. The first one has been done for you as an example.

| Name and date | Direct/indirect reference | Idea expressed |
|---|---|---|
| O'Riordan, 1976 | Indirect | E |
| John Muir | | |
| | | |
| | | |
| | | |
| | | |

**3.3** **Study the list of ideas expressed in the box below. Match the ideas with the appropriate references in the table above, and complete column 3.**

The first one has been done for you as an example.

## Ideas expressed by environmentalists

**A** Once people have fulfilled their basic human needs, they want to achieve a better quality of life.

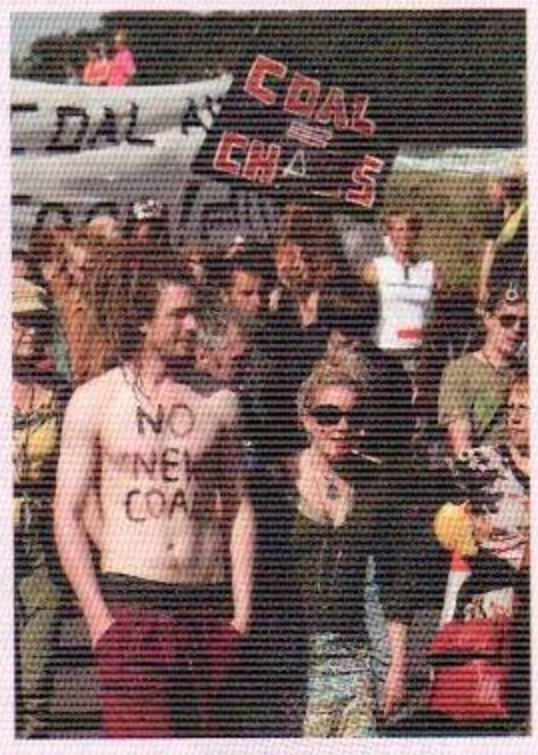
**B** Interest in the environment tends to relate to the condition of the economic climate.

**C** Environmentalism is a way of demonstrating political values.

**D** It is essential for the environment to be preserved, for the sake of our future.

**E** The awareness of environmental issues is not necessarily a modern concept.

**F** Only certain privileged sections of society have environmental concerns.



## Task 4: Purposeful reading

Any reading you do should have a clear purpose. In the case of Project 1, it should help you find information relevant to the project title: *To what extent can the problems of urbanization be met by a policy of sustainable development?*

As discussed in Unit 1 (page 17), it is useful to define the key terms in any essay title or question. In this case, the key terms you are asked to define are *sustainable development* and *urbanization*. You are now going to try to find definitions of these terms, which you will later incorporate into your project. Thus, your purpose for reading in this case is to find information relevant to a definition of these terms.

**Study tip**

When you read:
- always read with a purpose;
- look for relevant information and seek to identify and define key terms.

**4.1 Look at the sources in Appendix 4 on page 123. Highlight any text relevant to the definitions.**

Either underline the information, using a highlighter pen, or annotate the text by writing a note in the margin.

**4.2 Make a careful note of the source of the information, i.e., writer, title, date and page number.**

### Summarizing information from texts

One of the key skills involved in using/referring to sources is *summarizing*; this means being able to state clearly and succinctly the key ideas or thrust of an argument. The summary should be in your own words, with an acknowledgement of the source. If you summarize ideas in the exact words of the original without acknowledging the writer, or fail to name your source, this is considered to be plagiarism – a form of cheating. If you change some of the words of the original, or put it in your own words, and do not acknowledge the source, this is also considered plagiarism. Universities have strong views on plagiarism, which is discussed further in Unit 4 on pages 51–55.

#### How to summarize

- First, it is important to decide why you are summarizing. Are you going to use this information in an essay? Do you need only the main ideas, or are the details also important? Perhaps only sections of the text are relevant, in which case you need to be even more selective.
- Before you attempt to summarize, it is essential that you understand the material you plan to summarize; if the ideas in the material are not clear to you, then they will not be clear to the reader when you express them in writing.
- It is useful to take notes. The first reason for this is to identify clearly the main points of the text, and the second reason is to use your notes as the basis for writing. In this case, the purpose is to write a summary; often in your project or essay you will use your notes as the basis to express a writer's ideas in your own words (with appropriate referencing, of course).
- Write your summary using your own notes as a stimulus; put the original text away. If you write your summary while looking at the text, it will make it more difficult to summarize in your own words.
- When you have finished your summary, you may want to read the original text again to ensure you have all the information you need.

## Task 5: Features of a summary

**5.1** **Study the features below and decide which you think characterize a good summary.**

**5.2** **Discuss in pairs or small groups. Make a note of your ideas so that you can justify your reasons to the whole class.**

a using the same order of facts and ideas as the original

b using all the information from the original

c using none of the same vocabulary as the original

d using different grammatical structures from the original

e emphasizing the points you feel are important in the original

f giving your opinion about or commenting on the original text

**Source:** Trzeciak, J. & Mackay, S.E. (1994). *Study skills for academic writing*. Trowbridge: Prentice Hall.

## Task 6: Stages in writing a summary or paraphrase

When summarizing or paraphrasing, it is advisable to use the N.O.W. approach:

- **NOTE**
- **ORGANIZE**
- **WRITE**

**Imagine you have been asked to summarize the short extract on page 29 from the text *Environmental problems and management*. Using the N.O.W. approach will involve:**

**a)** making notes on the main points (N);

**b)** organizing your notes (O);

**c)** writing a summary based on your notes (W).

The four stages below show one way of carrying out this assignment.

**Stage 1:** *Decide on the purpose for summarizing the extract*. This is very important, because your purpose will determine which particular points you wish to summarize from the text. In this case, your purpose is to use this text as background in an essay you are writing.

**Stage 2:** *Underline the key points*. This is the **N**ote stage of the summary process.

**6.1 Look at the extract and underline what you think are the key points.**

> Interest in the environment is not a recent phenomenon; the environment has always affected the growth and development of humankind, as a source of materials as well as a refuge for the human spirit. The recent interest in protecting the environment is a reflection of both the demand of society for a better quality of life, which may include using the environment as a haven, as well as the need to replenish sources. The difference between the present day and the pre-1960s era is the extent to which concern for the environment has become important; there is much greater interest ...

**Stage 3:** *Make a list of the key points.* Write the points that are relevant to the essay title in note form. Use your own words where appropriate, as shown below. This is the **O**rganize stage of the summary process.

**6.2 Compare the list of key points below with the key points you underlined. Are they the same?**

1) interest in env. = not just recent; always int. as source of raw materials + 'refuge for human spirit'
2) reasons for recent int. = int. in 'better quality of life' + need to replenish sources of raw materials
3) cf. current interest with pre-1960s = environmental concerns now given more priority

**Stage 4:** *Write the summary based on your notes.* This is the **W**rite stage of the summary process.

**6.3 Compare the sample summary with the original text. Do you think the summary achieves its purpose, as stated in Stage 1 on page 28?**

## Sample summary

Man has always had an interest in the environment both as a source of raw materials and as a 'refuge for the human spirit'. Nowadays, the two main environmental interests are based on the concept of a 'better quality of life', as well as the need to replenish the sources of raw materials. In comparison with the pre-1960s, much greater interest in the environment is currently being expressed.

**Source:** Jordan, A. & O'Riordan, T. (1999). Environmental problems and management. In P. Cloke, P. Crang & M. Goodwin (Eds.), *Introducing human geographies* (pp. 135–140). London: Arnold.

# Task 7: Practice summary 1

**7.1 Read the text on page 30, *The making of modern Japan*. Your purpose is to answer the following question.**

What is surprising about modern Japan's current position in the industrialized world?

**7.2** **Follow the N.O.W. stages in order to write your summary answer in two or three sentences.**

## The making of modern Japan

Modern Japan is a nation of contradictions. Economically *powerful and prosperous, its future economic prosperity depends* on continued access to reliable sources of external raw materials and stable markets. Militarily constrained because of its U.S.-created constitution, Japan relies on U.S. military strength and the benign intention of others to maintain its security. Pro-Western and modern in its cultural outlook, it reveres old Japanese traditions and customs. The contradictions that exist in Japan – and influence its perceptions of itself and the world – are a product of Japan's historical experiences.

From a global perspective, Japan is a unique nation. With a population half that of the United States and a gross national product 40 per cent the size of the United States, Japan must import large percentages of almost every raw material that modern industrialized societies need. Since Japan's evolution to an industrial power did not begin until the late nineteenth century, and since it had no scientific technical tradition, the strides it took to transform itself into a relatively modern industrial state by the beginning of the twentieth century were truly amazing.

**Source:** Papp, D. (1994). *Contemporary international relations*. New York: Macmillan.

## Notes

## Summary

## Task 8: Practice summary 2

Imagine you are writing the following assignment.

*Discuss the causes of the decline of animal species.*

**8.1** **Think about the information you could extract from the text below to help with your assignment.**

**8.2** **Follow the N.O.W. approach to write your summary in no more than four sentences.**

### No safety in numbers

In the early 18th century flocks of migrating passenger pigeons had darkened the skies over eastern North America, taking three days to pass by. Hunters simply pointed a gun upwards, fired, and then got out of the way as the pigeons tumbled to earth. When the birds stopped to roost, trees broke under their combined weight. With an estimated population of somewhere between 3 and 5 billion, the passenger pigeon was the most abundant bird that ever lived. Yet by the late 1890s the species was almost extinct. A few birds found their way to zoos, but they languished in captivity and refused to breed.

It was a result that perplexed the eminent conservationist, Wallace Craig and his contemporaries, and today's conservationists often face a similar problem. It isn't that living in a zoo can ruin an animal's sex drive. When wild species experience a population crash they can go into free fall, even though you would think that by removing the pressure of over-crowding, the survivors would flourish. New conservationists are beginning to realize that under-crowding itself can help drive species to extinction. It's a counter-intuitive idea, but it's not a new one: the consequences of low population density were first studied more than half a century ago by American biologist Warder Allee.

For decades his ideas were largely forgotten, but now an awareness of these 'Allee effects' looks set to transform conservation practices. "They alter our perception about the risks facing populations that have declined markedly, even if they are not numerically tiny," says Georgina Mace from the Institute of Zoology in London.

**Source:** Barnett, A. (2001). Safety in numbers. *New Scientist*, 169, 38–41.

## Task 9: Practice summary 3

**Choose *two* sections from the sources you are using to write your project. These should be relevant to your project. Write a summary, using the same method you have been practising in this unit.**

## Unit Summary

In this unit, you have learnt about the importance of providing evidence in academic writing and discovered different methods of incorporating sources. You have also practised summarizing information.

**1** **Another student has asked you for advice about selecting texts to read. Write three good reasons for choosing one text rather than another.**

a) _____

b) _____

c) _____

**2** **The same student has asked you for advice about how to read a text. Write the three most useful pieces of advice that you would give.**

a) _____

b) _____

c) _____

**3** **Complete this summary about incorporating evidence into academic work with some of the words from the box.**

| summarize | express | evidence | acknowledge | quotations | weight | paraphrase | proof |
|---|---|---|---|---|---|---|---|

It is important that any claim, opinion or generalization made in an essay is supported by _____. You need to show _____ that what you are saying is correct. To incorporate evidence into your writing, you can _____ a specific idea from the writer in your own words or you can _____ the content of a text (write a shorter version which concentrates on the main information). Occasionally, you might want to use direct _____ (the writer's exact words). When you use other people's ideas, you must _____ them. This means referring to them both within the text and in a bibliography at the end of the text.

**4** **Complete each of these statements about writing summaries with your own ideas.**

a) Two things I should do when I write summaries are _____ and _____.

b) One thing I mustn't do when I write summaries is _____.

For web resources relevant to this unit, see:
**www.englishforacademicstudy.com/student/ewrs/links**

These weblinks will provide you with a step-by-step guide to academic writing, as well as detailed information about referencing conventions.

# 3 Structuring your project and finding information

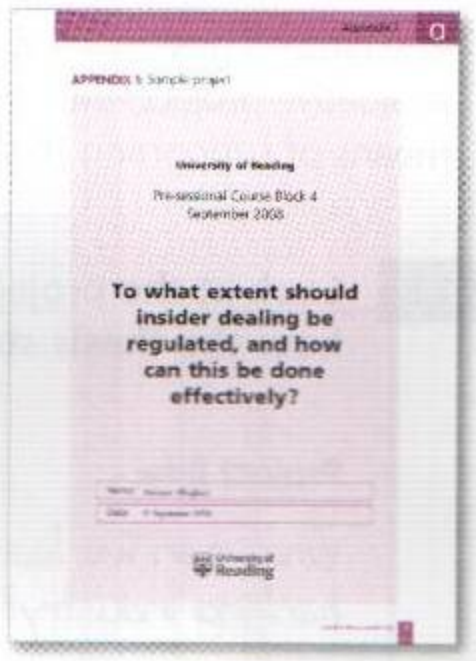
In this unit you will:

- look at how a project is structured;
- learn to identify evaluative writing;
- practise academic referencing;
- practise selecting information from websites.

## Task 1: The structure of projects

In Task 1, you are going to look at a project called *To what extent should insider dealing be regulated, and how can this be done effectively?* (Appendix 1, page 109). This is quite a good project, as it was completed by a student who may have had more experience of writing projects than you do.

First of all, you are going to look at various sections of the project so that you can learn some of the vocabulary related to writing.


APPENDIX 1: Sample project

University of Reading

Pre-sessional Course Block 4
September 2008

**To what extent should insider dealing be regulated, and how can this be done effectively?**

**1.1** **Look at the parts of an academic text listed in the box below. Which of these do you already know about? Discuss them with a partner and think about where they might appear in the text.**

- **a** the conclusion
- **b** a quotation
- **c** a reference in the text
- **d** a subtitle/subheading
- **e** the introduction
- **f** the bibliography
- **g** the first name initials of an author/researcher
- **h** the family name of an author/researcher
- **i** the main title page
- **j** a figure or table
- **k** the abstract

**1.2** **Not all projects will contain each of the elements listed here. For example, some projects may not have tables or figures, if this is not appropriate. Look at the project *To what extent should insider dealing be regulated, and how can this be done effectively?* Which features from the box above can you find there?**

## How to write an evaluative project

One of the most common problems with projects written by pre-sessional students is that they are too descriptive. It is essential that the description should form only *part* of the project, at most, and that the emphasis should be on the writer's *position*, or point of view. Project writers should use the information and ideas from their sources to support this position.

**Study tip**

Description should form only part of your project; the emphasis should be on your *position*, or point of view. You should use the information and ideas from your sources to support this position.

In order to develop such a position, writers need to think carefully and critically about the *content* of their sources. Once they have developed a point of view based on what they have read, writers should select the most appropriate sources to *support* their perspective.

The writer's position in a text is what may be referred to as her/his thesis. In order to write an evaluative project, the writer should develop a thesis as the starting point and use the sources as the means of supporting this thesis.

**1.3** **Look at the project title below. Think about how this leads to the thesis statement and how the thesis statement influences the project content.**

**Project title:**

What can we learn from the restructuring of Korea's banking industry?

The title of this project is written in the form of a question. The answer to this question should form the writer's thesis. There are a range of possible answers to the question 'What can we learn ...?' For example, we can learn 'a great deal', 'quite a lot', 'very little' or, in fact, we can learn 'nothing at all'. However, based on an analysis of the sources that s/he has read, the student might decide on the thesis below.

**Thesis statement:**

The restructuring of the Korean banking system should serve as a model for all banking systems throughout south-eastern Asia.

As the student states that the Korean banking system should serve as a 'model', this thesis clearly suggests that 'a great deal' can be learnt from the Korean restructuring exercise.

The thesis might also raise the question '*Why* does the restructuring of Korea's banking system serve as a 'model'?' The answer to this question should make the project more discursive and analytical. In other words, it will no longer suffice for the writer to describe the Korean banking system, because this will not answer the question 'why?'. What is required is an *explanation* of the reasons. This may involve a comparison with other banking systems; it will at least entail an explanation of the features of the Korean banking system that are particularly effective.

**1.4** **Study the flow chart on page 35 and think about why a *description* of the Korean banking system will only form part of the project. Then discuss with a partner.**

**Topic:** The restructuring of the Korean banking system

**Title:** What can we learn from the restructuring of Korea's banking industry?

**Thesis:** The restructuring of the Korean banking system should serve as a model for all banking systems throughout south-eastern Asia.

**Introduction**: Possibly a general summary of all the features of the Korean banking system or a chronological summary of the system's history. The thesis statement usually forms part of the introduction. There may also be an outline of the structure of the project.

**Main body:** First section: possibly some background information about the Korean banking system that is relevant to the restructuring, e.g., stages at which the restructuring occurred and why it was necessary.

**Main body continued:** Subsequent sections: an explanation of why each feature of the Korean banking system makes it a 'model', i.e., an analysis of the model. The writer's stance is supported by relevant source references.

**Conclusion:** Refers back to the thesis statement and draws upon the comments made about all the features described to provide a summative evaluation comment. Possible reference to further analysis that might be carried out on the topic, or a theory about the future of the Korean system/banking in south-eastern Asia in general.

**Reading:** Critical reading goes on at every stage of the writing process, so that the writer can add to the content.

**Text development**

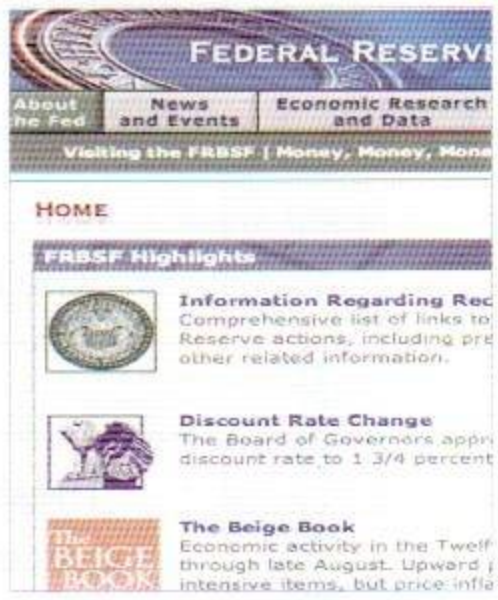
**Text development**

**Text development**

**Text development**

## Task 2: Descriptive and evaluative writing

In this task, you will be looking at four paragraphs related to Korean banking from the Federal Reserve Bank of San Francisco website. These paragraphs only form part of the full document, which may be viewed at the website address given at the end of the text.




**2.1** **Read the following extract from *Banking system developments in the four Asian tigers*. Identify the paragraphs that are mainly descriptive and tick them in column 2 of the table below.**

| Paragraph | Mainly descriptive | Evaluative comments |
|---|---|---|
| 1 | | |
| 2 | | |
| 3 | | |
| 4 | | |

**2.2** **Reread the text and identify paragraphs that show examples of evaluative writing. Tick these in column 3 of the table above.**

1. Over the past 30 years, Hong Kong, Korea, Singapore and Taiwan have had remarkably rapid and sustained economic growth, earning them the nickname the four tigers. Because of the new investment opportunities they provide and because their experiences may offer lessons for less developed economies, they have attracted considerable attention from the financial and policy communities, as well as from economists who have renewed interest in research in theories of economic growth. Despite their physical proximity and shared economic vigour there are some noticeable differences among the tigers. For instance, Hong Kong and Singapore are cities with limited resources, whereas Taiwan and Korea are economies with relatively large populations and more diverse industrial structures.

2. All four economies started out poor in all areas except potential labor supply before they began to grow in the 1960s ... Exports from the four economies together made up over 10% of the world's total exports, only slightly less than the US in 1994, compared to only 2.5% in 1971 (Glick and Moreno, 1997). The relative shares of imports were about the same. These numbers make it clear that external trade has been an important element in the development of these economies. The external sector (imports + exports), measured relative to total GDP, represented 52% in Korea, 73% in Taiwan, 240% in Hong Kong, and 280% in Singapore in 1994 (for the US, by comparison, it was 17%) ...

3. Commercial banks also played a critical role, because they were the major source of private savings. In Korea and Taiwan, the governments required commercial banks to extend credit towards industries targeted in the governments' development plans. Furthermore, due to regulated loan rates, which were below market-determined interest rates, and the lack of loanable funds, these loans were offered at very favorable lending rates ...

4 In 1994, the manufacturing sector accounted for about 31% and 27% of GDP in Taiwan and Korea, respectively, whereas banking and financial services accounted for 18% and 17%. In contrast, the relative shares of the manufacturing and financial sectors were 28% and 27% for Singapore and 9% and 27% for Hong Kong. The figures seem to reflect the emphases of the past development policies. "The financial system was rather the accommodator of this real economic performance than its instigator," wrote one economist after examining the role of the financial sector in economic development experiences of these economies (Patrick, 1994). Recent banking sector developments in Korea and, to a lesser extent, Taiwan point to the negative side-effects that government direction of credit to preferred industries can have in the long run. Singapore's experience seems to suggest that a government could implement industrial development policies without directing the credit decisions of the commercial banking sector. Finally, Hong Kong's case seems to illustrate that an active industrial policy may not be essential for rapid economic development.

**Chan Huh, Economist**

**Source:** Chan, H. (1997). Banking system developments in the four Asian tigers. *Federal Reserve Bank of San Francisco Economic Letter*, 97–122. Retrieved April 8, 2009, from http://www.frbsf.org/econrsrch/wklyltr/el97-22.html

## Task 3: Reading for a specific purpose

Students are required to read extensively on academic courses, as mentioned in Unit 2, Task 1. It is therefore essential to develop your selective reading skills. The most effective way to do this is to think about your purpose for reading at every stage of your research. For example, if you are looking for a definition to use in the introduction to your project, you should identify the parts of the text that contain this specific information and not worry about the rest of the text at this point.

**Study tip**

Extensive reading requires a selective approach. You should therefore have a clear purpose for reading at all times.

**Look back at the flow chart on page 35 and decide on the purpose for reading in relation to each section. Underline parts of the flow chart which you think are related to a clear reading purpose.**

For example, one reason for reading might be to look for some general information about the Korean banking system in order to make notes for your introduction.

### Reading critically

It is also very important to *think* about what you are reading, i.e., to read *critically*. First of all, you have to decide whether the text you are reading is useful. Secondly, you should decide whether you agree with what is said in the text. A third important critical reading skill is to relate information in the text to what you already know; for example, are there any other texts you have read with similar information that supports or undermines the ideas you are reading?

**Study tip**

Critical reading involves thinking about what you read and questioning, e.g., whether:

- you agree with the ideas;
- your other reading supports or undermines the text.

This critical approach to reading is an *active* skill and helps you *interact* with the text. This in turn aids your understanding of it. In addition, it helps you to make important decisions about the text you are reading; for example, whether to skip certain sections of the text, or whether to read a particular section very carefully – you may even decide to make no further use of the text. Interacting with the text and making decisions as you read can save you a great deal of time in the long run.

As you read more about your topic and take relevant notes, you will be able to make connections between ideas that will help you plan and structure your writing. The more you think about what you are reading, the better you will be able to write an evaluative report.

## Task 4: Choosing sources

We are now going to look at why the texts in Appendix 4 were chosen for you to refer to when completing your first project. Those students not completing this project will also benefit from the analysis.

**4.1 Look at the example notes below, analyzing the text *Settlement changes in LEDCs* from Appendix 4 (pages 127–131). Check the five reasons using the text reference and the text itself. Evaluate each reason and discuss with a partner.**

| | |
|---|---|
| **TEXT** | Bilham-Boult, A., Blades, H., Hancock, J., Keeling, W. & Ridout, M. (1999). People, places and themes. Oxford: Heinemann. |
| **Why it was chosen** | • It was published in the last 10 years.<br>• It was published by an established publishing company: Heinemann.<br>• It contains various case studies dealing with the problems of urbanization and how to solve these problems.<br>• Readers can compare the situation in different cities in different parts of the world. This gives them the opportunity to discuss the contents, not simply describe them.<br>• It contains some useful photographs and tables. |

**4.2 Make similar notes of your own on three of the other texts from Appendix 4. Be prepared to compare and discuss your notes.**

| | |
|---|---|
| **TEXT** | |
| **Why it was chosen** | |

| TEXT | |
|---|---|
| Why it was chosen | |

| TEXT | |
|---|---|
| Why it was chosen | |

## Task 5: Finding information

### Finding information in textbooks

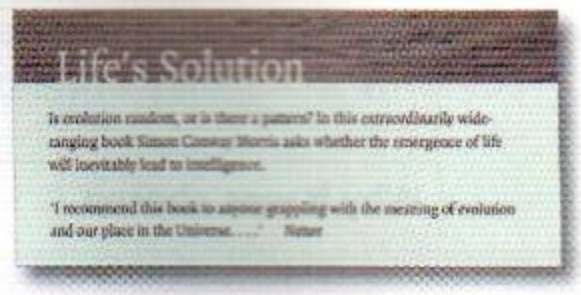
Many students experience difficulties in choosing the most appropriate texts to read when beginning their academic studies. This is because there seem to be so many texts they have to read to find information and ideas they want. Time becomes a real matter of concern as deadlines for completing assignments draw closer.

You are more likely to find what you are looking for if you have a clear idea of your purpose, as mentioned already. If you have a clear focus, you can look for the specific type of information you need. Textbooks are one source; you may find several textbooks that could interest you, and you can follow a particular procedure to determine the usefulness of each one and save time. This is the first stage in reading critically.

## Procedure for choosing appropriate reading material

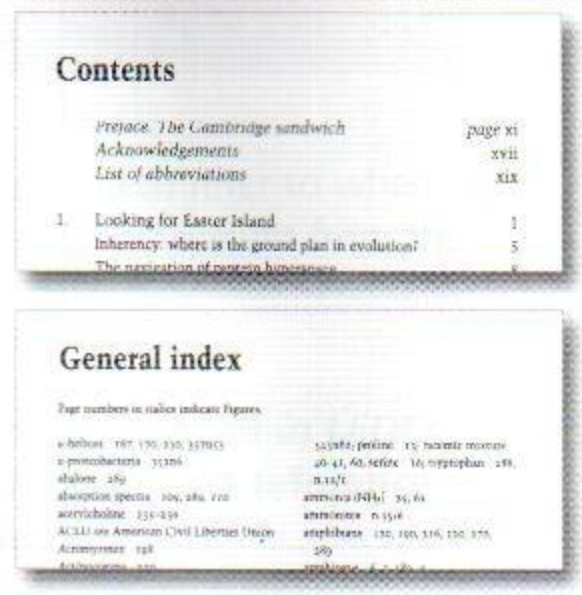
**Check each of the following.**

- **Title:** do you immediately feel it might meet your needs?
- **Blurb:** the publicity information about the book, written to attract the attention of the reader. This is usually found on the back cover.
- **Table of contents:** this provides a clear overview of what the book is about.
- **Index:** the alphabetical list printed at the back of a book, telling you on which pages important key words, information or topics are referred to.
- **Date of publication:** an important indication of relevance, i.e., how current is the information?
- **If it is on the recommended reading list:** this is the list of books (or core texts) that a particular departmental or course lecturer suggests students read for a particular course.
- **Abstract (used for journal articles, papers, theses, dissertations, etc., rather than textbooks):** if well-written and concise, this provides a quick indication of the usefulness of the text (see page 56).


Life's Solution

Is evolution random, or is there a pattern? In this extraordinarily wide-ranging book Simon Conway Morris asks whether the emergence of life will inevitably lead to intelligence.

'I recommend this book to anyone grappling with the meaning of evolution and our place in the Universe. . . .' Nature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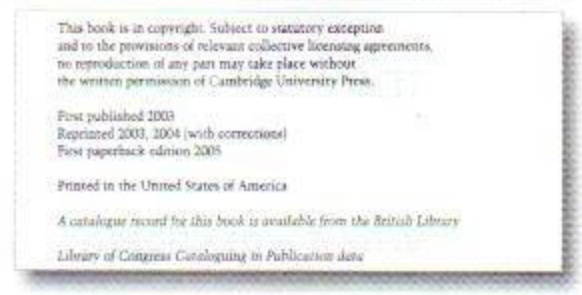
General index

Page numbers in italics indicate figures.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**5.1** **Go to the main library (or your department library) and find two books in your subject area. Follow the procedure described above for the two books you have chosen. Complete the tables below with details about the books.**

**BOOK 1**

| | |
|---|---|
| **Subject area** | |
| **Title** | |
| **Author** | |
| **Date of publication** | |
| **Intended reader** | |
| **Why I would/would not recommend this publication** | |

BOOK 2

| | |
|---|---|
| Subject area | |
| Title | |
| Author | |
| Date of publication | |
| Intended reader | |
| Why I would/would not recommend this publication | |

**5.2** **Based on the information you find, be prepared to report briefly what you have learnt about one of the two books to your classmates. For example:**

- what it is about;
- who it might be appropriate for;
- why you would or would not recommend this book for other students in your subject area.

## Finding information in journals

Journals are another source of information, and if you can identify the most appropriate articles, they may provide information about quite a lot of work in the field (or subject areas). Most journal articles are introduced by an abstract, which is a brief outline of the article (see below).

The Internet is the most rapidly expanding source of information, and you can often find journals online. The best way to access these is through your library website. However, you need to be careful about how to narrow down your search, as you may find you have far too much information to look through. This will create a time problem for you. There are other issues you need to know about searching online, and you will do some work on this later in the unit.

## Making use of abstracts

An abstract is a short summary of the main points of an academic text. It is therefore a useful way of identifying whether a text is suitable for your purpose (see the example below). The abstract is written after the paper has been completed, when the author has a clear idea of the final content of the article. We will look at abstracts in more detail in Units 4 and 8, when you will learn how to write your own.

### Should all markets be under government control?

In general, markets relate to the private sector, and the government does not have the right to interfere in their rules and regulations (Johnston, 2002). In spite of this, they often do, which causes controversy. This project attempts to examine the issues involved and to show that the government might be the most appropriate intervening body to regulate markets and to ensure that they function effectively.

## Finding information online

Online information is increasingly becoming a source of academic evidence. In certain fields, e.g., business and economics, online material may be the *main* source. As there is a greater volume of information available than ever before in this medium, it is essential to be systematic and critical when choosing your sources.

http://www.leeds.ac.uk

http://www.whitehouse.gov/

It can be difficult to decide whether websites are reliable; however, certain websites may be considered *well researched*. Examples of reliable websites are those constructed by educational or government institutions. You can recognize these websites in the following ways.

**.ac** refers to academic websites. These are always linked to universities. An example is http://www.reading.ac.uk

**.gov** refers to government websites. These are linked to official government organizations, e.g., http://www.defra.gov.uk/sustainable/government/

Other websites may have a commercial interest and can be recognized as follows: **.com** and **.co**. Websites containing **.org**, on the other hand, are usually non-profit and non-commercial.

A website that contains the ~ symbol (tilde) refers to a personal website. You need to be cautious when using such websites, unless you have a good knowledge of the author.

**5.3 Look at the information outlined in the table below and discuss it with a partner.**

The explanations in the table should help you to critically analyze the websites you encounter. If you cannot find answers to the key questions in the column on the left, then you are not able to rely on the source, i.e., you may not be able to use it in your work.

| | |
|---|---|
| **Title:**<br>• What is the name of the text? | • This will often suggest whether the contents are very specific or if the text gives an overview. |
| **Authority:**<br>• Who has written the text? Is the writer a recognized authority, with several publications, or whose ideas are referred to by other sources?<br>• Is it supported by an organization you can trust?<br>• Is it possible to check the writer's credentials? | • Sometimes the 'authority' may be an organization, not an individual. Sometimes the 'authority' is supported by an organization. It is important that you are able to check this.<br>• If you cannot find the author or organization responsible for the website, it cannot be used, as you have no way of checking reliability. |
| **Date/currency:**<br>• When was the website last revised? | • If the information on the website has not been revised appropriately, then it is possible that it is not particularly useful. This may depend on your subject area. |
| **Content:**<br>• What is the text about?<br>• How useful is the text? | • Make sure that it is relevant to your understanding of the topic.<br>• Your evaluation of the content will depend on your reading purpose. |

| | |
|---|---|
| **Accuracy:**<br>• Does the information appear to be accurate, to the best of your knowledge?<br>• Are there references to other sources?<br>• Are there links to other websites? | • You may be able to check the accuracy of the information in another source.<br>• It is expected that ideas are supported by other sources.<br>• This can often be a way to check the reliability of the website. |
| **Audience:**<br>• Who is the intended reader? | • Has the article been written for academics, or at least for readers with a strong interest in the topic, or has it been written for the general reader (like a newspaper article)? You can usually tell the intended audience from the supporting organization or institution. You can also tell by the style of the language. Does it appear to be formal/neutral, or is it informal? If it appears to be informal, it is unlikely to be a reliable source. |

## Task 6: Analyzing websites

You are now going to practise critically analyzing websites. The title of Project 1 is: *To what extent can the problems of urbanization be met by a policy of sustainable development?* The tasks below give you some practice in searching for information.

**6.1** **Use Google or any other appropriate search engine to find two websites: one on 'urbanization' and the other on 'sustainable development'.**

**6.2** **When you find what look like useful websites, complete the tables below.**

| **Topic** | *Urbanization* |
|---|---|
| **Title of article** | |
| **Authority** (who wrote it) | |
| **Date** (currency) | |
| **Contents** (a brief summary) | |
| **Accuracy** (of information) | |
| **Audience** | |

| Topic | Sustainable development |
|---|---|
| **Title of article** | |
| **Authority** (who wrote it) | |
| **Date** (currency) | |
| **Contents** (a brief summary) | |
| **Accuracy** (of information) | |
| **Audience** | |

## Task 7: Acknowledging your sources

**7.1** **Why do you think it is important to reference the sources you use when writing a project? Add your ideas to the box below.**

**Reasons for referencing sources:**

1. To show where your ideas originated from – acknowledging the source.
2. _____
3. _____
4. _____

**7.2** **Compare your ideas with the information on page 45.**

**Note:** Whenever you use information from other sources, there are certain conventions you need to follow. There are two different aspects to acknowledging a source.

- Within your essay, refer to the author by surname and the date of publication (textual reference).
- List your reference at the end of your essay, giving detailed information of the source (bibliography of references).

## Reasons for referencing a source

There are a number of reasons for referencing sources. For example:

- to show where your idea originated from – acknowledging the source;
- to show that you have done research to find 'evidence' for your viewpoint – references help to give your text academic 'weight';
- to show that you are aware of the opinions/views expressed by writers in the field;
- to allow the reader to look at the original source if necessary.

Not referencing your sources, and thus failing to acknowledge other people's ideas, is considered to be plagiarism. This is not accepted academically. You will learn more about this in Unit 4.

**Study tip**

Plagiarism is something that must be avoided in academic writing. You will begin to understand the importance of this by referencing sources.

**Ways of referring to a source**

- **Quotation:** Citing the exact words of the author.
- **Paraphrasing:** Retelling what the writer said, in your own words.
- **Summarizing:** Identifying the point you want to make from your source and writing it in your own words. Whereas a paraphrase will include all the detail, a summary will be shorter and will include only the key information.

Generally, writers use a mixture of summarizing and paraphrasing, and only use quotations occasionally; generally they should only be used:

> when you feel that the author expresses an idea or an opinion in such a way that it is impossible to improve upon it or when you feel that it captures an idea in a particularly succinct and interesting way (Trzeciak and Mackay, 1994, p. 59).

## Task 8: Academic conventions in referencing

There are a variety of conventions for showing direct quotations. For example, you can indent the quotation if 40 words or more are used.

**Study the examples of referencing direct quotations on page 46. Discuss with a partner any differences you notice.**

## Direct quotations

### A quotation of 40 words or more

Various measures are already taken to reduce city-centre congestion, but these alone may have little noticeable impact:

> Sophisticated traffic management systems can increase efficiency in the use of road spaces and the number of vehicles using road systems without congestion. But, increasingly, even if the incorporation of these advances was accelerated, it is seen as insufficient as the sheer volume of cars, trucks and other motorized vehicles overwhelms cities (Newman, 1999).

Alternative approaches include initiatives aimed at reducing dependence on vehicle transport.

### A quotation of fewer than 40 words

There are a number of views about what constitutes successful verbal communication. One area to consider is the people involved in a conversation, but there are cultural restrictions on coming to a conclusion about this: "A good conversation partner tends to empathise with others, being sufficiently aware to jointly create a conversation" (Lo Castro, 1987, p. 105).

First of all, we need to consider what is meant by 'to empathise with others' in Lo Castro's context.

### A quotation within a quotation

As stated by Adams (1999): "internationally, the dominant definition of sustainable development has undoubtedly been that of the Brundtland Report: 'development that meets the needs of the present without compromising the ability of future generations to meet their own needs' (Brundtland, 1987, p. 45)."

## Paraphrasing or summarizing

Various ways of referencing within a paraphrase or summary are given below.

- Summarize or paraphrase the writer's ideas and put the author's surname and date of publication in brackets at the end of the sentence.

> Since the cultural values of any society have an effect on how the people of that culture interact, sociocultural norms determine linguistic production, as well as limit how it is produced (Gumperz, 1989).

- Refer directly to the author in the text and put the publication date in brackets.

> According to Gumperz (1989), since the cultural values of any society have an effect on how the people of that culture interact, sociocultural norms determine linguistic production, as well as limit how it is produced.

- Refer to the author directly and put her/his surname and the publication date in brackets at the end of the sentence.

> According to Cottrell, there are seven approaches to learning which can make it more productive (Cottrell, 1999).

### Internet sources

As with printed sources, when referencing an Internet source within a text, you need the author's surname and date. In this case, the date used refers to when the website was most recently updated. In some cases, the information may have been put up by an organization, with no single author's name. In this case, you include the name of the organization within your written text, i.e., organization and date. *You do not include the website address in your main text; this goes in the bibliography.*

> The UK Government view on the use of natural resources is that it is possible to continue using them, but at the same time the development of alternative sources such as renewable energy should be considered (UK Government, 2003).

## Task 9: When to avoid using online sources

**Discuss the statement below with a partner. Think of reasons why this is good advice and list them below.**

If you cannot find either an author or the name of an organization on the website, you should not use it in your work. You should also check when the source was most recently updated.

## Task 10: Writing a bibliography

**10.1** **Look at the bibliographical entry in the box below. Match the labels a–j with the elements of the bibliographical entry 1–10.**

| | | | |
|---|---|---|---|
| **a)** title of article | _____ | **f)** editor's surname | _____ |
| **b)** name of publisher | _____ | **g)** place of publication | _____ |
| **c)** date of publication | _____ | **h)** author's initials | _____ |
| **d)** author's surname | _____ | **i)** other editors | _____ |
| **e)** title of book | _____ | **j)** shows book is a collection of articles | _____ |

1 2 3 4 5 6

Adams, W.M. (1999). Sustainability. In P. Cloke, P. Crang & M. Goodwin (Eds.), *Introducing human geographies* (pp. 125–129). London: Arnold.

7 8 9 10

**It is the title of the book or journal which goes in italics, not the title of the chapter or article. When referencing a book, you should capitalize only the first word of the title (except where the title contains proper nouns, which are always capitalized).**

**Now look at the rest of the bibliography, which has been set out appropriately.**

Anderson, J.A. (2002). *Going where the big guys don't.* Retrieved February 20, 2007, from http://www.businessweek.com/bwdaily/dnflash/feb2002/nf2002025.htm?chan=search

Cottrell, S. (1999). *The study skills handbook*. Basingstoke: Macmillan.

Leki, I. & Carson, J. (1997). Completely different worlds: EAP and the writing experiences of ESL students in university courses. *TESOL Quarterly, 31*(1), 39–69.

**10.2** **There are some problems with the bibliography below. Identify the problems and rewrite the bibliography in the appropriate form. Use the sample bibliography above and the guide in Appendix 5 to help you. Check your answers in small groups.**

Alan Bilham-Boult et al. 1999. People, Places and Themes. Heinemann, pp. 17-22

Adams, W.M. 1999. Sustainability. In P. Cloke et al. (eds) *Introducing Human Geographies*. Arnold, pp 125-129

'Africa Recovery' E. Harch (2003). [online]. Available from: http://www.africarecovery.org Accessed 18 May 2004

P. Newman, Transport: reducing automobile dependence. In D. Satterwaite (ed.) *The Earthscan Reader in Sustainable Cities*. Earthscan Publications pp 67-92 (1999)

## Unit Summary

In this unit, you have seen how projects are structured and learnt to identify evaluative writing. You have looked at academic referencing and practised selecting information from books and websites.

**1** **Mark each of these parts of an academic text with U, for *I understand exactly what this means and can recognize it*, or D, for *I don't really understand what this means*.**

a) introduction __ d) bibliography __ g) subtitle __ j) abstract __
b) reference __ e) contents page __ h) figure / table __
c) quotation __ f) main title page __ i) conclusion __

**2** **Tick (✓) the statement in each pair that is true for you.**

a) 1 I know how a project should be structured.
2 I don't really understand why a project should be structured in a particular way.
b) 1 I can quickly see what is description and what is evaluation when I read a project.
2 I find it difficult to distinguish between description and evaluation when I read a project.
c) 1 I understand why it is important to write evaluatively when I write a project.
2 I don't really understand why I should write evaluatively when I write a project.
d) 1 I find it fairly easy to identify the writer's thesis when I read a project.
2 I don't really understand what a thesis is.
e) 1 I understand why it is essential to have a thesis when writing evaluatively.
2 I don't see why it is necessary to start an evaluative project with a thesis statement.
f) 1 I know exactly what the purpose of the conclusion to a project is.
2 I don't really know why it is necessary to write a conclusion to a project.

**3** **In each statement below, highlight the option that applies to you when you read.**

a) I find it *easy / quite easy / quite difficult / very difficult* to read selectively.
b) I find it *easy / quite easy / quite difficult / very difficult* to keep my purpose in mind.
c) I find it *easy / quite easy / quite difficult / very difficult* to read critically.

**4** **Complete each of these statements so that it is true for you.**

a) The most important thing I have learnt about finding information in books is _____

_____.

b) The most important thing I have learnt about finding information from websites is _____

_____.

For web resources relevant to this unit, see:
**www.englishforacademicstudy.com/student/ewrs/links**

These weblinks will provide guidance on referring to primary and secondary sources in your writing, as well as help with finding information online.

# 4 Developing your project

In this unit you will:

- find out how to make the best use of the tutorial system;
- learn about plagiarism and how to avoid it;
- learn about the features of abstracts and their purpose.

## Introduction

### The tutorial system

A tutorial is usually a private meeting between your teacher (who may be called your personal tutor) and you, the tutee. All undergraduate and postgraduate students will be assigned a tutor when they begin their academic courses. However, students who are going on to study for a PhD will be assigned a supervisor.

If you have a tutor, s/he will probably have several tutees. Usually, you will meet with your tutor to discuss academic issues.

### The appointment system

Your tutor may set up a system for notifying you of appointments by e-mail or through the use of Blackboard or a similar virtual learning environment. Your tutor may decide when and how often you should attend a tutorial, or s/he may simply leave a blank form where you can fill in your preferred time. See below:

#### Sample appointment form

| Date | Time | Name |
|---|---|---|
| August 15th | 2.15 | Suzy |
| August 15th | 2.35 | Ali |
| August 16th | 2.15 | Cai |

### Making the best use of tutorial time

Tutorials may last anything from a few minutes to more than half an hour; usually, you will have a specific time allocated, e.g., 20 minutes. As it is your responsibility to get the most you can from the tutorial in the short time that you have, it is important to come well prepared. You should therefore think about things you wish to talk about before you attend a tutorial, e.g., aspects of your project you need to discuss, or any questions about your feedback or class work that need clarification. You should also bring a notebook so that you can make a brief note of any information or advice you get. However, you will not have time to write down everything during the tutorial – just headings. You should therefore make notes immediately after the tutorial while the information related to your discussion is still fresh in your mind.

**Study tip**

You may find that some tutors on your academic course are less patient and understanding than many of the teachers on a pre-sessional course, which makes preparation for tutorials all the more important.

## Task 1: Preparing for tutorials

Imagine that you have just received the feedback sheet below from your project teacher after completing the first draft of a project.

**Study the feedback sheet. Then prepare a set of questions you would like information or advice about during a 20-minute tutorial.**

***To what extent can the problems of urban development be met by a policy of sustainable development?***

| | |
|---|---|
| **Content** | You have lots of information here, but your essay is still very descriptive. Think about what you have been reading – what is your opinion about it? |
| **Organization** | Try to link the introduction and conclusion to the main body of the text. At the moment they seem like separate paragraphs. For example, in the conclusion you could refer to what you have covered in the main body. |
| **Language** | Check the grammatical use of 'according to'. Check how to use the present perfect tense – you still confuse this with the past simple. |
| **Presentation of work** | Make sure you have used the correct font size for headings. You have not used the appropriate style in the main body of your text. |
| **Use of sources** | You use sources on the first page – but then you don't use any more. Any idea that comes from a source you have used must be referenced. What happened to your list of references at the end? |

### Avoiding plagiarism

You are now familiar with referencing and why it is important in academic writing. However, sometimes when you are summarizing or paraphrasing ideas, even if the source is acknowledged, the way you write may be too similar to the original to be acceptable.

You therefore need to use your own words as far as possible to avoid this problem. Obviously, there may be certain specialist words or key words in the original text that you need to use in order to explain concepts or ideas. But it is important to avoid writing something that is too close to the original, even if you think the writer can express the ideas much better than you can.

Writing from your notes rather than directly from the reading text will help with this. Try following the steps below.

- Take notes of the information you might use.
- Organize your ideas about the information and, if possible, explain them to someone else. If you cannot clearly explain the text you have read, you may not have fully understood it.
- Based on your notes, write up the information you need for your project.

Remember the N.O.W. approach from Unit 2 (page 28).

## What is plagiarism?

The word *plagiarism* derives from a Latin word meaning *thief*; plagiarism is a form of academic theft. In its most blatant form, it involves word-for-word copying of large sections of another writer's material and claiming it as your own work. In a less extreme, but no less unacceptable, form, it involves reproducing shorter lines or phrases linked together, perhaps with minor modifications, in the pretence that these are *your ideas* expressed in *your own words*.

It is therefore essential to express your ideas appropriately and acknowledge your sources. If you do not do this, *it is the equivalent of stealing ideas*. Look at the policy of the University of Reading on this, below. The complete information is on the university website. There are also some guidelines on how you can avoid plagiarism. The statement made in the box below is an extract from the website section entitled *Academic Misconduct*.

### EXAMINATIONS OFFICE

**Academic Misconduct**

Cheating, which is the attempt to gain an advantage for oneself or another by deceit, and other misconduct are breaches of discipline under the University's Regulations for Conduct 33(b), and are punishable by a range of sanctions.

**(a)** Cheating in assessed coursework (for example, dissertations, long essays or projects) and open book examinations includes:

**(i)** Plagiarism

Plagiarism is the fraudulent representation of another's work as one's own. This applies whatever the source of the material (for example, a published source, the web, or the work of another student), whether the material is copied word for word or paraphrased, and whatever the extent of the material used.

**Source:** University of Reading, Examinations Office. (2009). Retrieved April 16, 2009, from University of Reading website: http://www.reading.ac.uk/Exams/wyntkMay2009.pdf

## Why you must avoid plagiarism

As you can see, you must *never* plagiarize. The consequences could be serious and could damage your academic career and indeed your chances of getting a job. Even if you do plagiarize accidentally, this is not accepted as an excuse.

The following tasks are designed to help you recognize plagiarism. Remember that the key factor is acknowledging the sources used.

## Task 2: Quotations, paraphrases and plagiarism

Imagine a student has highlighted the following extract in a politics textbook.

> Gorbachev declared that the countries of the world shared mutual interests and faced mutual threats that went beyond class conflict. This was a revolutionary perspective for a Soviet leader, because a Marxist-Leninist class conflict was the ultimate driving force behind history (Papp, 1994, p. 290).

The student has decided to incorporate ideas from this extract in an essay. We will consider seven different ways the student might go about doing this, some of them appropriate and some of them not.

**2.1 Read the seven examples of incorporated text below. Decide whether the incorporation is a quotation or a paraphrase and place a tick (✓) in the appropriate column.**

**2.2 Think carefully about the seven incorporations and decide whether you think the student would be guilty of plagiarism. Mark the third column with a tick (✓) to indicate plagiarism, or a cross (✗) to indicate no plagiarism.**

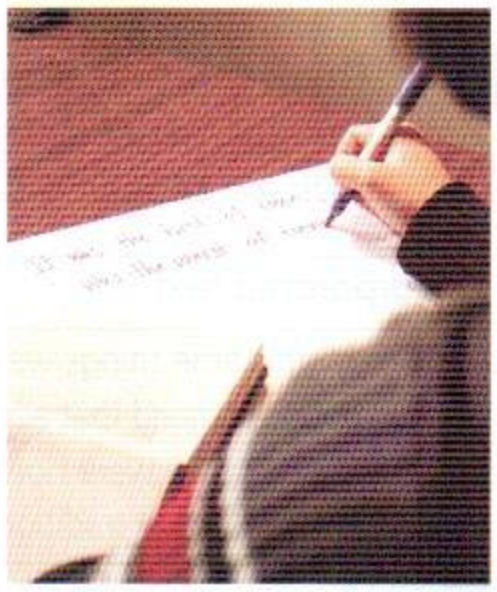
| Incorporated text | Quotation | Paraphrase | Plagiarism |
|---|---|---|---|
| **1** But by this time things were changing in Russia. The new leader, Gorbachev, argued that all countries in the world had interests in common, which were not connected with class. This was very different from the traditional Soviet view (Papp, 1994). | | | |
| **2** But by this time things were changing in Russia. Gorbachev declared that the countries of the world shared mutual interests and faced mutual threats that went beyond class conflict. This was a revolutionary perspective for a Soviet leader, because a Marxist-Leninist class conflict was the ultimate driving force behind history. The West reacted to this new way of talking … | | | |
| **3** But by now things were changing in Russia, where the new leader was talking about how the different countries of the world faced similar problems. Such beliefs represented a complete break with standard Soviet philosophy. The West reacted to the new mood in the USSR by … | | | |
| **4** But by now things were changing in Russia. Established Soviet dogma was being abandoned by the new leader, whose views concerning the common interests of different countries in the world, both East and West, clearly represented a revolutionary perspective for a leader of the USSR. The West reacted to such changes by … | | | |
| **5** But by now things were changing in Russia. The new leader was expressing views which were very different from traditional Soviet ideology. As one theorist puts it: Gorbachev declared that the countries of the world shared mutual interests and faced mutual threats that went beyond class conflict. This was a revolutionary perspective for a Soviet leader, because a Marxist-Leninist class conflict was the ultimate driving force behind history (Papp, 1994, p. 290). | | | |
| **6** But by now things were changing in Russia. The new leader was expressing views that were very different from traditional Soviet ideology, in that they represented a revolutionary perspective for a leader of the USSR in which the class struggle was the driving force. The West reacted to such changes … | | | |
| **7** But by now things were changing in Russia. The new leader was expressing views about the need for international action that were so different from established Soviet ideology that they represented a "revolutionary perspective for a Soviet leader" (Papp, 1994, p. 290). The West reacted to the new Soviet mood by … | | | |

**Source:** Papp, D.S. (1994). *Contemporary international relations: frameworks for understanding*. New York: Macmillan.

## Task 3: Avoiding plagiarism

**3.1** **Look at the following reasons that students might give for plagiarizing. Think about what advice you could give them.**

Note that your advice must contain constructive help on how to *avoid* plagiarism.



**a)** I didn't know it was wrong.

**b)** I don't know how to use references, or how to cite my sources.

**c)** I don't have enough time to do the necessary reading, or to develop my own ideas.

**d)** The text is so difficult for me to understand that I just copied the text and hoped it was OK.

**e)** The text I copied said exactly what I wanted to say, and I couldn't express it better.

**f)** In my country, we are expected to reproduce the exact words and ideas of the text or the teacher.

**3.2** **Discuss your ideas with another student and agree a common strategy. Then write your advice in the box below each reason.**

### Advice on avoiding plagiarism

**a)** Lack of awareness of rules:

**b)** Lack of familiarity with how to reference:

**c)** Lack of time:

**d)** Level of difficulty of reference text:

**e)** Inability to express ideas better:

**f)** Different cultural experience:

# Task 4: Working with abstracts

## What they are

An abstract is a form of summary. It can be used to summarize the contents of an academic text, such as an academic paper, a journal article or an oral presentation. It is very useful to look at abstracts in order to find out quickly about the main ideas of a text, and thus to decide whether the text is relevant to your needs.

When you first look at an academic article, the title and abstract give you an overall impression of what the article is about. The abstract normally describes the aims of the research, the methods used to investigate the aims, and the main findings and conclusions. From the abstract, the reader can understand the broad content, results and conclusions without needing to read the whole paper. The abstract should stand alone and be independent of the rest of the paper. Good abstracts allow researchers to find and assess quickly a wide range of relevant work. In effect, they are a way of assisting the wider academic community to work together on common problems or areas of interest.

## How they are used

Abstracts are also used to assess pieces of research for acceptance at conferences, an important part of academic life. These meetings allow researchers from around the world to get together, and to assess and circulate the work of others in the academic community. Once an abstract is accepted, it will be presented in one of two ways: as a poster presentation or as an oral presentation. Either way, to reach this stage, your abstract must be of a high quality for the conference committee to accept it.

As a student, you may be expected to include abstracts at the beginning of pieces of extended writing, as well as to submit an abstract if you are going to give an oral presentation based on your project.

As with other aspects of academic writing, such as introductions and conclusions, abstracts have certain typical features. We will look at these in detail in the tasks that follow.

**Study tip**

Often, when carrying out research, you will initially find many sources that appear to be relevant, so it is difficult to decide which sources to concentrate on. However, by referring to abstracts first, you will often be able to decide more quickly and make informed decisions.

**4.1** **Read abstracts A and B. What *features* can you identify?**

**Example:** Essential background information

## Abstract A

In the last 20 years, several researchers have described the possible changes that computers may bring to the field of language testing. Since the review carried out by the University of Fredericktown (Huntley-Gordon, 2008), writers in the Candelford Language Testing and Assessment Series have suggested various predictions of how computer technology could change the testing of foreign language skills. The enthusiasm for much greater use of computers in language testing is based on the idea that computer-based tests will be better than traditional pencil-and-paper tests. This paper sets out to examine the accuracy of this belief and will suggest some important advantages of computer-based testing together with some words of caution.

## Abstract B

Assessment of observed teaching practice sessions on teacher training courses is viewed in general by the teaching profession as a flawed but necessary method of evaluation. The nature of observations means that criteria must be flexible to account for diverse teaching styles, while at the same time providing the observer with the guidance to make an informed decision on the trainee's performance. Inevitably, observers have their own set of personal theories that affect their assessment, resulting in inconsistency of grades awarded by different observers.

The results suggest that standardization can help effect greater observer agreement, but the limitations of the study mean that the results need ratification through further research. It was found that discussion of grades raised issues such as the need for clearer criteria for grades, the need to limit the list of attributes graded and the importance of high-inference factors in teaching.

**4.2 Compare your ideas with the list of features below and tick (✓) the features you have identified.**

a) a general statement ☐
b) essential background information ☐
c) the aims of the project, dissertation or thesis ☐
d) an investigation into a particular topic or subject area ☐
e) the implementation of the investigation in a real-world situation ☐
f) how the text is organized ☐
g) details of the research carried out by the writer ☐
h) what the results of the research suggest ☐
i) a thesis statement ☐
j) a definition ☐

**4.3** **Look at abstracts C and D. Do these two abstracts have the same features as abstracts A and B?**

Which other features of abstracts do they contain? Refer to the list on page 57.

## Abstract C

This project describes the development of China's securities market while analyzng its shortcomings. It also discusses some recently proposed solutions. During the last ten years, significant progress has been made in a very short time in terms of the market scale and trading facilities, even by Western standards. This project describes the main achievements in China's securities market. However, this market has not achieved full credibility due to problems, such as an inefficient regulatory framework, high speculation, corporate governance deficiency and undue government intervention. To deal with these problems, several methods are being considered, which include the government changing the labour laws, the introduction of new initiatives, and the strengthening of self-regulation in the supervision process. The government will also ensure that this legislation is enforced.

## Abstract D

Banking has developed over the last 300 years. Due to advances in technology, banks can provide a variety of products for their customers. In 1947, banks began to issue credit cards. In the last 20 years, they have become their most advanced financial product. In Taiwan, major development of credit cards began in 1983. However, only three banks are making a profit in the credit card market. It is very important, therefore, for Taiwanese banking to develop an understanding of the credit card system used in the West. This paper will begin with an introduction to the credit card business, and then describe early developments in the industry in certain Western countries. Secondly, the recent developments in the Taiwanese credit card market are addressed. Finally, the extent to which Taiwanese banks should absorb Western practices in promoting their credit card business is discussed.

**4.4** **Now read Abstract E. Which features does it *not* contain?**

## Abstract E

With the steady development of economic globalization, risk has become a controversial issue for financial institutions and non-financial firms. The management goals for banking or individual firms are no longer simply to gain profits but to try to control risk in order to gain maximum profits. This project aims to discuss the important role of managing risk and show the most effective way to manage it. Firstly, a definition of risk is provided, as well as a classification of the forms of risk. The project then goes on to discuss the different financial instruments used to manage risk, followed by an evaluation of the economic effect of risk management for financial institutions. It concludes by suggesting that risk cannot be fully avoided because the world is always changing and so is the financial environment.

**4.5** **Each of the above abstracts (A–E) refers to a project written by a former pre-sessional student. Based on your reading of each abstract, suggest what you think the titles of the projects were.**

The title for Abstract A is given as an example.

| Abstract | Possible title |
|---|---|
| A | *The potential provided by computer-based testing* |
| B | |
| C | |
| D | |
| E | |

## Unit Summary

In this unit, you have learnt about the tutorial system and how best to use it. You have also discovered more about plagiarism and how to avoid it. Finally, you have learnt about the features and purpose of abstracts.

**1** **Mark each of these statements true (T) or false (F).**

**a)** You will probably be your tutor's only tutee. ___

**b)** You can organize a tutorial with your tutor whenever you like. ___

**c)** Tutorials usually have a fixed duration. ___

**d)** Your tutor will decide what to talk about during a tutorial, so you don't need to prepare for it. ___

**e)** Sometimes it's a good idea to make notes during a tutorial. ___

**2** **Write three things that you might want to talk about during a tutorial.**

**a)** _____

**b)** _____

**c)** _____

**3** **Answer these questions about plagiarism.**

**a)** Which Latin word does the word *plagiarism* come from? _____

**b)** If you plagiarize, what exactly are you stealing? _____

**c)** What do you think is the most common reason why students plagiarize? _____

_____

**d)** What are the possible consequences of plagiarizing? _____

_____

**e)** If you paraphrase the ideas that you use as a source, does it always mean that you avoid plagiarism? _____

**f)** Suggest some possible ways of avoiding plagiarism.

_____

_____

_____

**4** **Complete these statements about abstracts. Imagine you are giving advice to another student.**

**a)** An abstract is _____

_____.

**b)** Abstracts are very useful because _____

_____.

**c)** Three typical features of abstracts are _____

_____

_____.

_____.

For web resources relevant to this unit, see:
**www.englishforacademicstudy.com/student/ewrs/links**

These weblinks will provide you with information on what plagiarism is and how to avoid it, as well as a guide to writing an abstract.

# 5 Developing a focus

In this unit you will:

- learn how to choose a topic;
- practise narrowing down the topic to establish a focus;
- come up with a working title;
- consolidate some of the skills you have been developing while completing Project 1.

## Introduction

One of the most challenging aspects of working on a project is establishing a title and deciding exactly what you will work on. It needs to be a topic that you can narrow down enough to establish a clear focus, so that the project is not too general. This is not always easy to do, as you may be interested in many aspects of a topic. However, by isolating one particular aspect, you can explore a subject in more depth, which is what is required in your academic work.

You will have encountered the first steps to writing a title in Unit 1, Task 6. These included:

- choosing a topic;
- brainstorming ideas;
- narrowing the focus by asking yourself questions;
- establishing a working title which is flexible and developmental;
- choosing some of your sources by looking at journals, books and websites.

We will look at this area in more depth in the tasks that follow.

## Task 1: Choosing a topic for your extended essay

Choosing a topic requires careful consideration; as you are working in your own subject area, you need to display a level of specialized knowledge that shows you have a deeper understanding of the subject. At the same time, you need to consider who your reader is.

**Study steps a–h for the process of choosing a topic. Put them in the appropriate order by numbering the list 1–8.**

**a)** Decide how practical it is to work on this topic. ☐

**b)** Find something in your subject area you are interested in. ☐

**c)** Summarize your project idea in one sentence. ☐

**d)** Decide how much you already know about the topic. ☐

**e)** Talk about your ideas. ☐

**f)** Think about a possible working title. ☐

**g)** Look for sources. ☐

**h)** Make a plan. ☐

**Study tip**

- Think about your reader – make sure your work is accessible to anyone who is interested.
- Your reader should not need to be an expert in the field to understand your ideas, but you should write as an expert.

## Task 2: Developing a topic

**Look at the following essay titles. Write the letters a–i where you think they should go in the box below, according to how general or specific each title is.**

**a)** *Bangladesh under water: what made it happen?*

**b)** *How to combat climate change*

**c)** *Three results of global warming in China*

**d)** *Increased rainfall: a sign of future weather*

**e)** *The causes and effects of global warming*

**f)** *The melting poles: the greatest danger from climate change*

**g)** *What is global warming?*

**h)** *The economic effects of climate change*

**i)** *The effect of temperature increases on maize production*

| Most general ➡ | ⬅ General/Specific ➡ | ⬅ Most specific |
|---|---|---|
| | | |

## Task 3: Establishing a focus

There are three stages in producing a project: *planning*, *researching* and *writing up*. In each of these stages, there are a number of smaller steps.

One way to establish a focus for your topic is to ask yourself questions about it. For example, *tourism* is a very general topic. In order to narrow it down, you could ask yourself some specific *Wh–* questions: *Why? Who? What? Where? When? Which? How?*

Note that you may not need to ask all these questions about each topic.

**Example questions:**

- Why is tourism important?
- Who is affected by tourism?
- What is tourism?
- Where does tourism have most impact?
- Which countries are most dependent on tourism?
- How is tourism affecting native culture?

**3.1** **Make a list of your own questions for the following topic, based on the examples given above.**

The education system in Argentina

**3.2** **Here are some general subjects chosen by students. How could you change them, using questions like those above, to make each topic more specific or focused?**

- Problems in the Chinese economy
- The economy of Taiwan
- Cybernetics
- The United Nations
- Genetically modified (GM) food
- Deforestation in Nepal
- Future developments in human health

**Study tip**

Your essay topic must have focus, so ask yourself specific questions about the topic, such as: *Why? Who? What? Where? When? Which? and How?*

## Task 4: Establishing a working title

A working title is a title that you initially think of in order to establish a focus for your research and writing. However, as you read and become more involved in the subject of your project, your viewpoint may change. You may decide to change your original plan, and this will affect your final title. This is all part of the process of developing your ideas, and thus part of fine-tuning your research skills.

**4.1 Study the following example of a working title and think about why it has changed from the original.**

The pre-sessional student who created this working title felt that the original one was too general. The student experimented with a second working title before arriving at the third and final title.

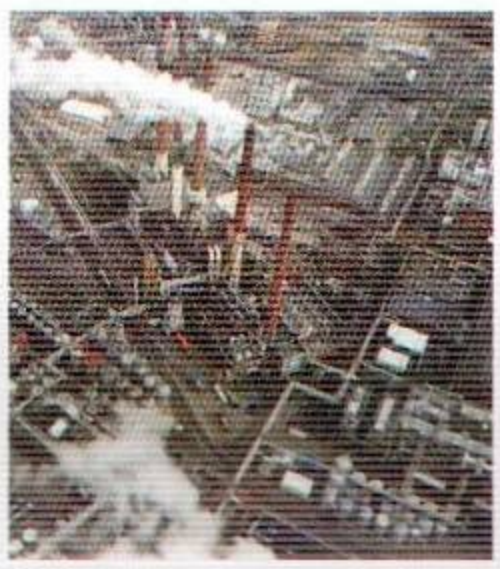
*Pollution and its relationship with people and the environment*

↓

*The social and environmental impact of pollution*

↓

*The environmental impact of pollution in urban areas*



**4.2 Look at the titles below. Decide why these titles are too general, then rewrite them to make them more specific. This will give the essay more focus.**

**a)** *Economics has a fundamental impact on our lives*

_____

_____

_____

**b)** *The origin of genetic engineering*

_____

_____

_____

c) *The effect of technology on society*

**4.3 Now choose two topics related to your subject area and develop your own working titles, going through the stages on page 62.**

You do not need to write projects on these titles, but the task will give you practice in focusing on specific areas. This will help you to be more precise when you write.

## Task 5: Planning Project 2

**You may already have done some reading, research and thinking about Project 2 in your own subject area. Based on this, complete the following plan as far as possible.**

**What is your topic?**

**Why have you chosen this topic?**

**Key questions (What do you want to find out about this topic?)**

**What is your focus and/or working title?**

## Thesis statement

## Specific title*

* This may develop later, or you may not know this until you have carried out some research in the library or online.

## Unit Summary

In this unit, you have learnt how to choose a topic for a project, how to narrow down the topic to establish a focus and how to create a working title.

**1** **Complete each sentence (a–e) with the correct ending (1–6). You will not use one of the endings.**

**a)** If I choose a topic that is too general, ☐
**b)** If I choose a topic that is too specialized, ☐
**c)** If I isolate one aspect of a general topic, ☐
**d)** If I choose a topic I already know about, ☐
**e)** If I display too much specialist knowledge, ☐

**1** I might find it difficult to gather enough information.
**2** it might be difficult to choose which information to use.
**3** my project will not be accessible to the average reader.
**4** I will understand the information I use better.
**5** I can explore it in more depth.
**6** it will be difficult to establish a clear focus.

**2** **A student has asked you for advice about establishing a focus for his project. Answer his questions below.**

**a)** Why is it important to establish a focus when choosing a topic for a project?

_____

**b)** How can I make a very general topic more specific?

_____

**3** **Delete the wrong option in each of these statements about establishing a working title.**

**a)** Having a working title helps the writer to *finish a project / establish a focus*.
**b)** A working title *very rarely / frequently* changes as a project develops.
**c)** If a working title changes, it usually goes from *being general to being specific / being specific to being general*.

**4** **Complete this statement so that it is true for you.**

In this unit, the most important thing I have learnt about project writing is _____

_____

_____.

For web resources relevant to this unit, see:
**www.englishforacademicstudy.com/student/ewrs/links**

These weblinks will provide tips on how to narrow down your essay topic and write a thesis statement, as well as a clarification of the role of the thesis statement.

# 6 Introductions, conclusions and definitions

In this unit you will:

- analyze the features of introductions;
- analyze the features of conclusions;
- analyze the features of definitions;
- identify the language of each of these components in a typical academic text.

## Introduction

### Writing introductions

While writing an academic text such as a project, it is important to think about the structure and to focus on individual components of the text, such as introductions and conclusions. The introduction is important; as the first part of your essay, it sets the tone for the reader by giving some idea of the content and the writer's position, and suggests how the piece of work is organized.

These are some of the key features that can be included in an introduction:

**a)** an introduction to the topic of your essay;

**b)** background information about your topic;

**c)** *justification for your choice of topic focus;*

**d)** an outline of the structure of the essay;

**e)** definitions of key terms related to the topic;

**f)** your thesis statement (your viewpoint or perspective);

**g)** your purpose in writing the essay.

## Task 1: Features of introductions

**1.1** **Discuss the features of Introduction 1, from the work of a pre-sessional student, with a partner. Then look at how certain features can be identified using Table 1 on page 71.**

**Introduction 1**

### The application of renewable energy technology in remote areas

Our life is heavily dependent on the supply of energy. After World War II, especially, developed countries received the great benefits of electricity. However, today more than 30% of the global population still live in off-grid areas, without electricity. This is mostly in developing countries or remote parts of developed countries, such as mountainous areas or isolated islands. Economically, it would be very challenging to produce electricity for these areas. As developing countries grow economically, the demand for energy will increase rapidly, thus adding to the pollution problems caused by fossil fuels. Renewable energy technology is the solution to these problems. This essay will first demonstrate the need for electricity in remote areas, and then the extent to which renewable energy technology can meet this need in remote areas will be examined by looking at some examples.

**Table 1: Features of Introduction 1**

| Feature | Example from text |
|---|---|
| **Introduction to topic** | *Our life is heavily dependent on the supply of energy.* |
| **Background information** | *After World War II, especially, developed countries received the great benefits of electricity. However, today more than 30% of the global population still live in off-grid areas, without electricity. This is mostly in developing countries or remote parts of developed countries, such as mountainous areas or isolated islands.* |
| **Justification** | To show the problems related to the production of electricity in developing countries, as well as the pollution caused by using fossil fuels. |
| **Outline of structure** | *This essay will first demonstrate the demand for electricity in remote areas, and then the extent to which renewable energy technology can meet this need in remote areas will be examined by looking at some examples.* |
| **Definition of key terms** | Not included. |
| **Thesis statement** | *Renewable energy technology is the solution to these problems.* |
| **Writer's purpose** | To show how to overcome the problem (by using renewable energy technology). |

From your discussion about the introduction, it will be clear that certain features overlap. For example, background information may be considered in part as justification, and the thesis statement may be linked with the writer's purpose. Furthermore, certain features are not always included. For example, in this introduction there is no definition of *renewable energy*.

**1.2** **Look at Introductions 2–4, also taken from the work of pre-sessional students, and identify the features listed on page 70. Underline these features and write the letter (a–g) in the margin opposite each one.**

**1.3** **Discuss your analysis of the introductions in small groups. Complete the summary table on page 72 by ticking (✓) the appropriate columns.**

**Introduction 2**

## Brand communication in China

Since China began to develop economically and to open up to world trade in the early 1980s, many international companies have entered the Chinese market. In the beginning, these companies entered the market with confidence and kept their customary management system and market strategy approach. However, they soon found this approach was not suitable for the Chinese economic environment, and they had to find a way to adapt to the new situation. Some of the European and American companies cooperated with Japanese companies, because they wanted to utilize the Japanese experience in the Asian market when marketing their products. They were interested in brand communication, which involves using a series of effective marketing strategies. This approach appears to work well in China. The issue of brand communication, including examining why this approach is necessary, and the steps involved in setting up, promotion techniques to promote the prestige of a brand, will be discussed in this project.

**Introduction 3**

## Downsizing as a necessity for survival

Over the past decade, an uncertain economic climate and the rapid development of technology have led to an increasingly sophisticated business environment. Under these rapid changes, in order to gain competitive advantages, organizations are being increasingly reoriented or converged. Downsizing (Steven et al. 1998) is a response to the external environment, as companies are attempting to reposition themselves so as to gain a competitive advantage in an uncertain marketplace. Emphasis is on 'lean and mean' as an effective way for organisations to achieve the 'lean' purposes of downsizing. Downsizing is necessary for survival in many cases. If human resource managers lack an appropriate downsizing programme, they will be faced with negative feedback from employees. This will lead to the opposite effect to the 'lean' performance and efficient purposes of downsizing. This project will examine how to present a positive vision of downsizing to employees. First, the purpose of downsizing will be addressed. Then, examples of the characteristics of an effective downsizing process will be examined. In the final part, three sets of data that evaluate the process of downsizing will be explored.

**Introduction 4**

## The development of a global company

'Global' means worldwide. But how does a company become global? Are there benefits to becoming a global company? This essay will first explain what a global company is, and then look at the difference between this and a non-global company. Secondly, the essay will explain global strategy and the benefits of these strategies. Finally, a case study of the globalizing development of Philips will be considered.

**Summary table**

| Feature | Introduction 2 | Introduction 3 | Introduction 4 |
|---|---|---|---|
| introduction to topic | | | |
| background information | | | |
| justification | | | |
| outline of structure | | | |
| definition of key terms | | | |
| thesis statement | | | |
| writer's purpose | | | |

## Task 2: Analyzing your introduction

**2.1** **Look at the introduction for your own project. Which of the features in the table below can you identify? Place a tick (✓) in the appropriate row.**

| Feature | My project | My partner's project |
|---|---|---|
| introduction to topic | | |
| background information | | |
| justification | | |
| outline of structure | | |
| definition of key terms | | |
| thesis statement | | |
| writer's purpose | | |

**2.2** **Exchange your introduction with a partner. Which features can you identify in her/his work?**

**2.3** **Now compare your findings. Are there any other features you found that are not on the list?**

You may need to discuss this with your teacher.

## Task 3: The language of introductions

**Look again at Introductions 1–4. Underline any expressions or phrases in these introductions that you think might be useful.**

Think about how you might use some of these in your own academic writing.

**Example:** *Introduction 1: This essay will first demonstrate ... and then ... will be examined by looking at some examples.*

### Writing a thesis statement

The thesis statement is one of the key elements in the introduction. Its purposes are:

- to help to focus the content by expressing a point of view;
- to direct the reader.

In addition, it may determine the organization of the text.

You can use the following guidelines to arrive at your thesis statement.

- Turn the title of the text into a question.
- Distil the answer into one or two sentences.
- If the title already is a question, simply write the answer.
- Ask yourself what is your viewpoint.

### Key points in a thesis statement

A strong thesis statement is specific and makes a point effectively.

**Example:** *Obsessive and excessive exercise is a cause of mental and physical problems.*

Notice the following points.

- There is one key idea.
- The *cause* and the *effect* are distilled in a single sentence.
- The reader gets a clear idea of the *content*, the *stance* (or viewpoint) and the probable *organization* of the text from this single sentence.

## Task 4: Identifying the thesis statement

The information above suggests that a thesis statement is a condensed form of the writer's purpose.

**4.1 Look at the text below and identify the purpose of each sentence. Two sentences contain simple background information (B), one is an explanation (E) and another is a thesis statement (T). Label each sentence with the appropriate letter. Then discuss your answers with a partner.**

Coffee contains caffeine. ☐

Excessive amounts of caffeine can be damaging to health. ☐

Recent research, however, indicates that a limited amount of coffee can be beneficial. ☐

It stimulates the brain, aids concentration and may help to limit the effects of certain diseases such as Alzheimer's disease and Parkinson's disease. ☐

**4.2 Read the introduction on page 75 from a book chapter called *New cities, new urban geographies* (Hall, 2001) and underline the thesis statement. Then answer the following questions.**

**a)** How does this thesis statement help to direct the reader and possibly determine the organization of the text that follows?

**b)** What functions do other sentences in this introduction perform?

The only consistent thing about cities is that they are always changing. Classifying and understanding the processes of urban change present problems for geographers and others studying the city. Cities, since their inception, have always demonstrated gradual, piecemeal change through processes of accretion, addition or demolition. This type of change can be regarded as largely cosmetic and the underlying processes of urbanisation and the overall structure of the city remain largely unaltered. However, at certain periods fundamentally different processes of urbanisation have emerged: the result has been that the rate of urban change has accelerated and new, distinctly different, urban forms have developed. This occurred, for example, with the urbanisation associated with industrialisation in the UK in the nineteenth century (Hall, 2001).

**Source:** Hall, T. (2001). *Urban Geography*. London: Routledge

**4.3 Write a short, four- or five-sentence introduction to a topic of your choice below (preferably related to your subject area).**

The introduction should contain a thesis statement.

## Task 5: Features of conclusions

### Writing conclusions

The conclusion at the end of your essay serves a number of functions.

- It is the final part of your text and so needs to pull together all the main ideas.
- It should refer back to what you outlined in your introduction and to your thesis.
- It is an opportunity to show the extent to which you have been able to deal with the issues involved in your thesis.

Just like introductions, conclusions have a number of features:

**a)** a logical conclusion that is evident from the development of the ideas in your essay;

**b)** a brief summary of the main ideas in the essay;

**c)** comments on these ideas;

**d)** predictions for future developments of the topic;

**e)** mention of further research that might be required;

**f)** limitations of the work covered by your essay;

**g)** a reference back to the thesis statement first mentioned in the introduction.

**5.1** **Look at Conclusions 1–4 on pages 76–78, taken from the work of pre-sessional students. They all contain some of the features, a–g, in the list above. Identify and underline the features from the list. Then write the letters a–g in the margin opposite the appropriate feature.**

**5.2** **Discuss your analysis of the conclusions in small groups.**

**5.3** **Complete the table on page 78 by ticking (✓) the appropriate columns.**

**Conclusion 1**

## The impact of technology transfer by multinational corporations

Whereas the aim of this essay was to evaluate the effect of technology transfer brought about by multinational corporations (MNCs), it has become a kind of summary of some researchers' theories. However, certain conclusions can be drawn.

Although investment into less developed countries by multinational corporations has many positive effects, there are also some problems. One of these is the problem of employee training. As mentioned in Section 3, with the present state of affairs, technology diffusion into developing countries via vocational training is not working effectively. One possible reason is that MNCs have to protect their advantage of knowledge and investment-intensive technology in order not to lose their competitiveness in the market. The reason MNCs invest in less developed countries is to achieve the comparative advantage of low wages and cheap resources. Although vocational training is essential for multinational corporations to succeed in the markets of these countries, they do not directly aim to develop the level of technology in less developed countries. In other words, the progress of technology in less developed countries is the secondary product of multinational enterprises. The original idea that this technology would transfer beyond efficient employee training for a specific purpose seems to have been an idealistic theoretical concept. However, if this situation is not changed, the technological gap between developed countries and developing countries will increase, leading to a widening of the gap between rich developed countries and poor developing countries.

Fortunately, as mentioned in Section 4, sophisticated companies have begun to realize their social responsibility, and recently have been trying to cooperate with governments and non-governmental organizations. It is to be hoped that this trend will continue, and thus MNCs will make a contribution to less developed countries through the development of transferable skills that can be applied to technological development, rather than using less developed countries purely for their own benefit.

**Conclusion 2**

## The application of renewable energy technology in remote areas

Industrialized countries have received a considerable number of benefits from energy, especially electricity, and the demand for energy has been increasing. However, as discussed above, there are still many people who do not have access to electric light, as a conventional energy supply system is not suitable in remote areas. In order to solve the energy crisis in remote areas, renewable energy technology has great potential. Although only two kinds of technologies have been examined in this work, other renewable energy technologies are advantageous, and these technologies have also been accepted in some areas as a main energy supply system. Nevertheless, even if renewable energy technologies are applied, it is not easy to establish the technology in poor societies. When this technology is applied, the concept of appropriate technology is extremely important. The designer needs to grasp the economic, technical, social and cultural background of the area. He/she also needs to think of the characteristics of each technology, as well as climatic conditions. Only well-planned appropriate technology that takes these factors into consideration will work in solving the serious energy problems in remote areas.

**Conclusion 3**

## Language aptitude as a factor in second language learning

This essay has discussed the features of language aptitude. It has emerged that language aptitude is often applied to the classroom situation, but not in real-life situations. As second language acquisition is such a complicated process, it is necessary to explore the influence of age, motivation, attitude, personality and the mother tongue, in order to understand the process more fully. It would be interesting to examine how these factors can influence language learning, and compensate for the natural aptitude that learners possess to a greater or lesser extent, as this project has shown.

Conclusion 4

## Why was the restructuring of the Korean banking system successful?

In the spate of bank crises in Asia, Korea's banking system also suffered the hardest time in its history. Seventeen commercial banks were closed and more than 40,000 bank employees were expelled from their companies. It cost 137.1 trillion won (equivalent to 110 billion US dollars) to restore the banking system. The crisis was inevitable because it was an eruption of deep-rooted problems, such as policy mistakes and poor bank management. However, Korea's banks successfully weathered the crisis. As of June 2002, Korea's banks recorded an historically high net profit, and their capital structures are the soundest in the world. Future prospects are good.

There are a number of factors which contributed to this success. Of these success factors, the following seem to be key. First, the Korean government followed many valuable lessons suggested by empirical studies. For example, it set up prompt and massive action plans, including a huge amount of public funds. It introduced a considerable number of standard global regulations and incentive systems in order to be competitive. Secondly, change in the political power of the time played a key role in implementing strict policies for restructuring. As the new government was relatively free from responsibility for the crisis and political interests, they could undertake firm action. Thirdly, nationwide consensus for changes strongly supported government reforms. The Korean people knew that change was needed in order to survive. Eventually, encouraged by nationwide consensus, the new government dared to challenge the tough task of restructuring the banking system.

### Summary table

| Feature | Conclusion 1 | Conclusion 2 | Conclusion 3 | Conclusion 4 |
|---|---|---|---|---|
| logical conclusion | | | | |
| brief summary | | | | |
| comments on ideas | | | | |
| predictions | | | | |
| further research | | | | |
| limitations | | | | |
| reference to thesis statement | | | | |

## Task 6: Analyzing your conclusion

**6.1** **Look at the conclusion of your own project. Which of the features from the table below can you identify? Place a tick (✓) in the appropriate row.**

| Feature | My project | My partner's project |
|---|---|---|
| logical conclusion | | |
| brief summary | | |
| comments on ideas | | |
| predictions | | |
| further research | | |
| limitations | | |
| reference to thesis statement | | |

**6.2** **Exchange your conclusion with a partner – which features can you identify in her/his work?**

**6.3** **Now compare your findings. Are there any other features you found which are not on the list?**

You may need to discuss this with your teacher.

## Task 7: The language of conclusions

**Look again at Conclusions 1–4 on pages 76–78. Underline any expressions or phrases you think might be useful in your own academic writing.**

**Example:** Conclusion 1: Whereas the aim of this essay was to evaluate ... it has become a summary of some researchers' theories.

## Task 8: Features of definitions

### Writing extended definitions

When writing about a topic, it is essential to clarify your terms, i.e., explain clearly what you mean by any key words in the essay. If you were writing about *human resource management*, for example, you would need to explain what you meant by human resources, so that both the writer and the reader have exactly the same interpretation of the term. You will often find that definitions form at least part of introductory texts to your subject area.

**Study tip**

When defining terms, make sure you are clear about who your audience is. You need to define any specialist terms that you do not believe will be shared knowledge.

The extent to which you need to define your terms will depend on your reader and your purpose for writing. For example, if you are new to the subject area, then for yourself (as well as, perhaps, for your tutor), you need to clarify some of the most basic terms. As you gain a deeper knowledge and understanding of the subject, and are writing for experts, the meaning of certain key terms can be assumed as part of 'shared knowledge'.

**8.1** **Look at the definition of the subject *Academic Studies* below and think about how useful it is for your purposes as a student.**

| Term | Definition |
|---|---|
| Academic Studies | *Academic Studies is a course that is designed to help students develop some of the research skills required in their future field of study.* |

As you will notice, this definition does not give you very much information about the course; an extended definition would be more useful to you. You might add to the short definition above by explaining what students are expected to do on an Academic Studies course.

| Term | Extended definition |
|---|---|
| Academic Studies | *Students work to produce an extended piece of writing on a topic in their subject area, and will also give an oral presentation on this topic. They are expected to read widely and select appropriate sources to support the ideas related to their topic. They work on summarizing and synthesizing information accurately, as well as evaluating what they read. They learn about the conventions of referencing and how to write a bibliography. They are expected to draw on the skills being developed in other components of the course, e.g., practising reading strategies by reading selectively, and working on the micro-skills of writing introductions and conclusions. The oral component of the course is also important, as students are expected to be able to discuss their ideas with both tutor and fellow students, as well as give a formal presentation. Students are, to a large extent, expected to work autonomously.* |

**8.2** **Look at Definitions 1–4 on page 81, taken from the work of pre-sessional students. Identify the features of the definitions from a–d below:**

**a)** a formal definition, e.g., from a dictionary or an expert in the field;

**b)** an expansion of the definition with an explanation and/or examples;

**c)** a comment on the definition by the writer;

**d)** references.

**Then complete the table below by ticking (✓) the appropriate cells.**

| Feature | Definition 1 | Definition 2 | Definition 3 | Definition 4 |
|---|---|---|---|---|
| formal definition | | | | |
| expansion | | | | |
| comment | | | | |
| references | | | | |

**8.3** **Underline or annotate the relevant parts of the definitions and discuss them with a partner.**

### Definition 1: Language aptitude

Some people have a natural language ability, which makes them adept at learning foreign languages, whereas others are rather poor at it and struggle to acquire a basic communicative ability in the language. A factor which makes a difference to the individual is often referred to as language aptitude. Though difficult to define in concrete terms, it is understood to be not necessarily the ability to learn the language in the classroom, but rather to be able to apply this knowledge in a real-life situation (Cook, 1991). While some people argue that this ability is not fixed, Carroll (1981) believes that aptitude is an innate or stable factor, which cannot be changed through training and is constant throughout one's life. He also insists that it is not related to past learning experience. This implies that language aptitude is not something that is accumulated as we age, but something we are born with. This may sound demotivating for those who are not equipped with language aptitude. However, as Ellis (1994) suggests, aptitude is only a facilitator which encourages learning, especially in accelerating the rate of learning, but not determining learning.

### Definition 2: Globalization

The term 'globalization' holds considerable interest. It refers to 'the idea that the world is developing a single economy and culture as a result of improved technology and communications and the influence of very large multinational companies' (Macmillan English Dictionary for Advanced Learners, 2000, p. 603). The term can also refer to the movement of people (labour) and knowledge (technology) across international borders. Globalization can help countries get rid of the barriers to the inflow of technology, capital, human resources and products. Generally, globalization makes the above more available, especially the accessibility of products. It can also speed up the development of foreign trade.

### Definition 3: A global company

A global company can be defined as a corporation consisting of a group of people who run a business in different countries as one body (Uniglobe, 2002). A global company is different from a non-global company. There are three main differences between a global company and a non-global company. First of all, a global company should introduce its same-brand products worldwide at the same time. Secondly, a global company must inform its subsidiaries around the world of major management decisions. Thirdly, each subsidiary of the global company based in a different country must compete at a national level by taking local preferences into consideration.

### Definition 4: Global

The term 'global' (or 'transnational') implies the centralization of management decision-making to overseas subsidiaries and highly efficient coordination of activities across national boundaries in pursuit of global competitiveness (Yip, 1992; Bartlett and Ghoshol, 1989). Geographically, global firms are similar to multinationals. Both are businesses operating in more than one country; however, they are totally different in nature. A multinational business refers to a company with branches in several countries with little coordination of activities, and decentralization of management decision-making (Bartlett and Ghoshol, 1989).

**8.4 Which definition is the most useful for the reader? Discuss in small groups. Make sure you are able to explain your choice.**

**Key research and writing skills:** When you give a definition, it is essential not to write a *circular definition*, e.g., 'an extended writing class is a class where students learn to write extended essays'. This is not helpful for the reader who wants to understand the meaning of an extended essay class.

A more useful, non-circular definition might read, for example, 'an extended writing class is one where appropriate academic writing skills and essential research skills are developed in order to help students produce longer academic texts such as projects or dissertations.'

It is recommended that you use an acknowledged source of reference, e.g., a dictionary or a recognized authority in the field. However, it is also important to comment on the definition, especially if you are looking at several sources with differing definitions. If you refer to more than one definition, it is important to state clearly which definition you prefer.

**8.5 Write an extended definition of your own subject area. Make sure that you include all of the features you found in the definitions on page 81.**

Your audience consists of your classmates and your teacher, who are not experts in the field, so remember to use terminology that you can easily explain.

## Unit Summary

In this unit, you have analyzed typical features of introductions, conclusions and definitions.

**1 Mark a–k with either I, for features of introductions, or C, for features of conclusions.**

a) background information about the topic ___
b) a brief summary of the main ideas in the essay, and comments on these ___
c) justification for the choice of topic focus ___
d) predictions for future developments ___
e) mention of further research that might be required ___
f) an outline of the structure of the essay ___
g) a definition of key terms related to the topic ___
h) limitations of the work covered by the essay ___
i) the thesis statement (the writer's viewpoint or perspective) ___
j) the writer's purpose in producing the essay ___
k) a reference back to the thesis statement ___

**2 Mark each of the features above as follows.**

✓ I used this in my project and think I used it well.
? I used this in my project but I don't think I used it very well.
✘ I didn't use this in my project.

**3 Complete the summary about definitions below with words from the box.**

| | | | |
|---|---|---|---|
| examples | terms | dictionary | interpretation |
| shared knowledge | comment | knowledge | |

When writing about a topic, you must clarify your _____ (explain clearly what you mean by any key words you use) so that the writer and the reader have the same _____. If you are new to the subject, you will need to define the most basic terms so that you understand them properly. As you gain _____ of the subject, and if you are writing for experts, the meaning of certain key terms can be assumed as part of _____. You can use formal definitions from a _____ or an expert in the field, expand a definition with explanations or _____, or make a _____ about the definition.

For web resources relevant to this unit, see:
**www.englishforacademicstudy.com/student/ewrs/links**
These weblinks will provide you with an explanation of the features of introductions and conclusions in academic writing, as well as a summary of how to use formal, informal and expanded definitions.

# 7 Incorporating data and illustrations

In this unit you will:

- learn how data is incorporated into academic texts;
- learn how to analyze data;
- practise using the language of data commentary.

## Introduction

Another aspect of academic writing is data commentary. Data is statistical information that may be presented graphically in the form of tables or figures. Data is used to support the information and ideas of the academic researcher. An illustration might be, for example, a photograph or diagram. In academic writing, illustrations should only be used to clarify ideas or information; in other words, they should enhance an explanation. You should always give the source for your data.

**Study tip**

- Only include data or illustrations if they have a purpose.
- Always refer to data in the text.
- Always state the source of the data.

## Task 1: The purpose of data

**1.1 Answer these questions, using your own knowledge and the information above.**

**a)** What is data?

_____

_____

**b)** Why is data sometimes included in academic texts?

_____

_____

**c)** Read the information on pages 85–86, which comes from a book called *Leisure & tourism: advanced GNVQ* (Youell, 1995).

1. What is the purpose of Figure 1.21?
2. What is the purpose of Figure 1.22?
3. What main conclusion can you draw from the data in Figure 1.22?
4. What is the purpose of Table 1.5?
5. What main conclusions can you draw from the data in Table 1.5?

**1.2 Both of the figures and the table have captions that briefly describe their content. What do you notice about these captions? Complete the following sentences.**

**a)** The language style _____

_____

**b)** The position of the caption _____

_____

**Text 7–1:** The development of jet aircraft

# The Development of Jet Aircraft

Fig. 1.21 A Boeing 767

**The technological advances in aircraft design which resulted from developments during the Second World War led to air travel becoming a reality for the masses of the population from the 1950s onwards. The Boeing 707 jet was introduced in 1958 and led to a surge in scheduled and charter flights, the latter being combined with accommodation, transfers and courier services to form the 'package holiday' that is so familiar to us in the early twenty-first century** (see Figure 1.21).

## The Introduction of the Package Tour

The 1960s saw the beginning of the rapid increase in the number of package holidays sold. Destinations such as the coastal areas of Southern Spain, the Balearic Islands and Greece were favourite locations for British and other European travellers. The convenience of an all-inclusive arrangement, coupled with the increased speed which the new aircraft brought, caught the imagination of the British travelling public. The age of mass tourism had truly arrived.

## Travel and Tourism Today

Tourism is now commonly referred to as 'the world's biggest industry'. According to the World Travel and Tourism Council (WTTC), in 1990 the industry:

- Generated an annual turnover equivalent to 5.9 per cent of the world GNP
- Employed 118 million people worldwide
- Accounted for over 6.7 per cent of the world's capital investment
- Contributed over 5.6 per cent to total tax payments worldwide

Figure 1.22 below shows the growth in travel and tourism gross output (sales generated) between 1987 and 1993.

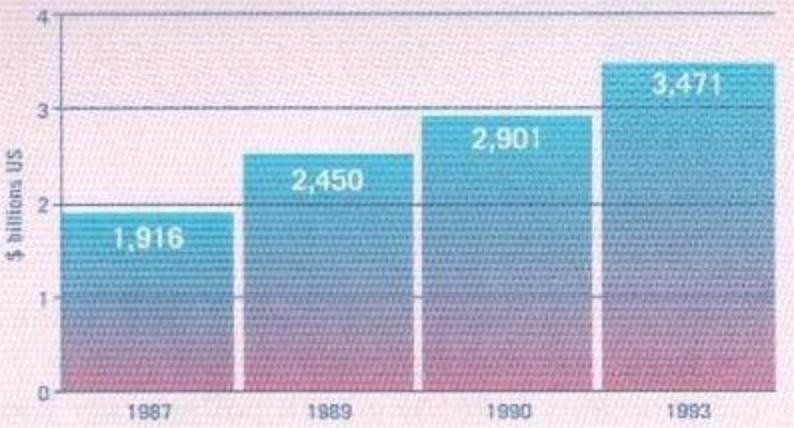



**Fig. 1.22 Travel and tourism output (source: WTTC)**
**Source:** Youell, R. (1995). *Leisure & tourism: advanced GNVQ*. Longman: Harlow.

The growth in total world tourist arrivals 1970–93 is illustrated in Table 1.5.

**Table 1.5 World international tourist arrivals 1970–93**
**Source:** Youell, R. (1995). *Leisure & tourism: advanced GNVQ*. Longman: Harlow.

| Year | Arrivals (million) | Rate of growth (%) |
|---|---|---|
| 1970 | 165.8 | 15.5 |
| 1971 | 178.8 | 7.9 |
| 1972 | 189.1 | 5.7 |
| 1973 | 199.9 | 5.1 |
| 1974 | 205.6 | 3.4 |
| 1975 | 222.3 | 8.1 |
| 1976 | 228.8 | 3.0 |
| 1977 | 249.2 | 8.9 |
| 1978 | 267.1 | 7.1 |
| 1979 | 283.1 | 6.0 |
| 1980 | 287.8 | 1.7 |
| 1981 | 290.1 | 0.8 |
| 1982 | 289.5 | -0.2 |
| 1983 | 292.7 | 1.1 |
| 1984 | 320.2 | 9.4 |
| 1985 | 329.6 | 2.9 |
| 1986 | 340.6 | 3.3 |
| 1987 | 366.7 | 7.7 |
| 1988 | 420.0 | 9.6 |
| 1989 | 431.2 | 7.3 |
| 1990 | 458.4 | 6.3 |
| 1991 | 456.7 | -0.4 |
| 1992 | 481.6 | 5.4 |
| 1993 | 500.1 | 3.9 |

Apart from the early 1980s and 1990s, when the world was experiencing recession, Table 1.5 indicates a steady growth pattern over two decades, culminating in more than 500 million tourist arrivals worldwide in 1993.

## The Trend in Overseas Visitors to Britain

Figure 1.23 shows that, despite the world recession of the early 1980s and the downturn in the economy in the late 1980s, together with the lingering effects of the Gulf War (1991), the numbers of overseas visitors to Britain showed healthy growth between 1981 and 1993 (the latest year for which figures are currently available).

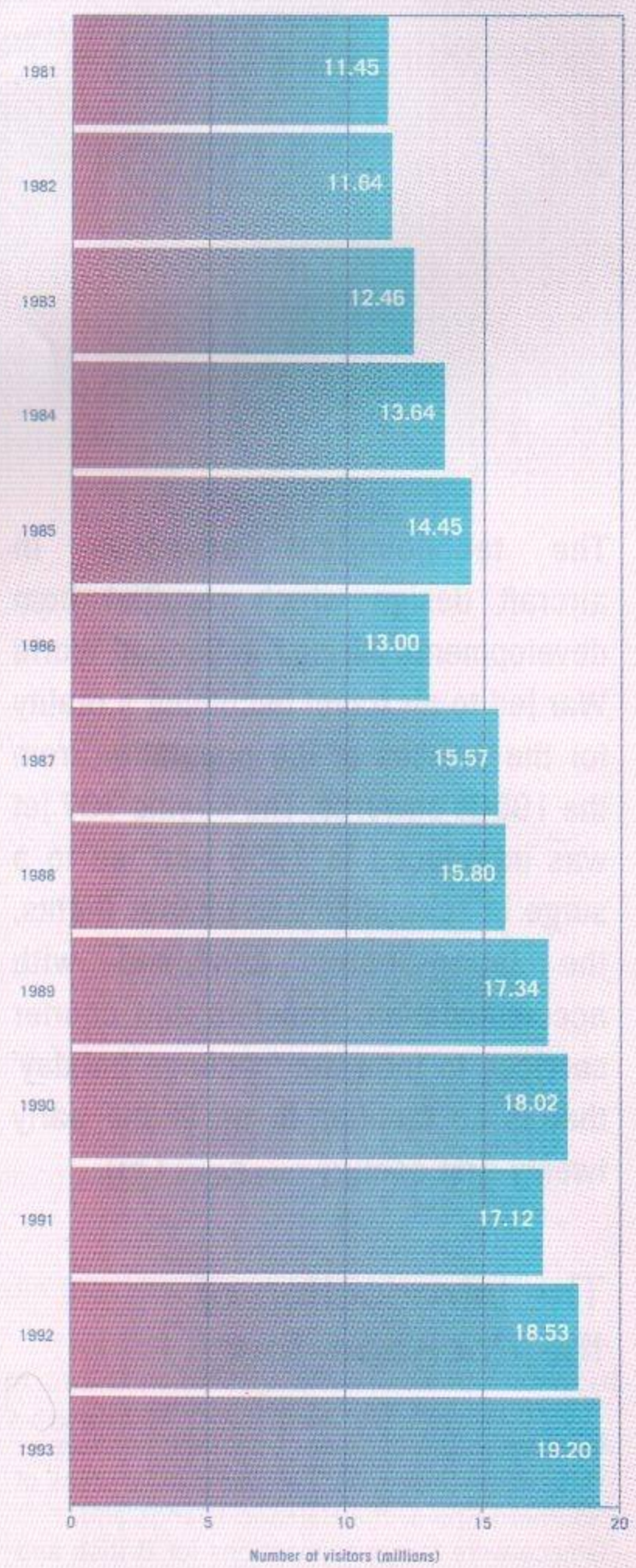



**Fig. 1.23 Overseas visits to Britain 1981–93 (BTS figures)**
**Source:** Youell, R. (1995). *Leisure & tourism: advanced GNVQ*. Longman: Harlow.

## Task 2: The language used for incorporating data

**2.1** **Look back at the text on pages 85–86. Find and highlight the language used in the text to refer to the figures and tables.**

**Example:** *see Figure 1.21* (page 85).

**2.2** **Look at the examples of data on pages 88–89 (Data 1–4). Identify whether each piece of data is a figure or a table and label it appropriately, e.g., Figure 1/Figure 2 or Table 1/Table 2.**

The data includes two graphs, a bar chart and a table.

**2.3** **The two captions below match two of the pieces of data (1–4). Identify which they are.**

**a)** Household take-up of digital television: by type of service

**b)** Selected media activities that would be missed the most: by age, 2008

**2.4** **Copy the captions, placing them in the correct position above or below the data (see pages 85–86).**

**2.5** **Now think of captions for the other two pieces of data and write them in the appropriate place.**

**2.6** **Read the text below and add a reference to each sample of data at a suitable place in the text. One example has been added for you (see text in bold below).**

In 2008, the 'digital switchover' began. Data from Ofcom **(Figure 2)** shows that nearly 87 per cent of homes in the UK had a digital television service at the end of the first quarter in 2008, a rise of 71 percentage points since 2000. A digital television set can also transmit digital radio stations. According to Radio Joint Audience Research Limited, the average time spent listening to the radio by people in the UK in the first quarter of 2007 was 19 hours and 24 minutes per week; average listening time increases with age. Between 2001/02 and 2006/07, radio listening fell among most age groups. The proportion of people reading a daily newspaper has also been declining for a number of years. The National Readership Survey shows that, on an average day, less than 44 per cent of people aged 15 and over in Great Britain read a national daily newspaper in the 12 months to June 2008, compared with 72 per cent in the 12 months to June 1978. In 2007, Ofcom asked which media activity respondents would miss the most if they were all taken away. Watching television would be the most missed activity for all age groups except those aged 16 to 19, who would miss the mobile phone the most.

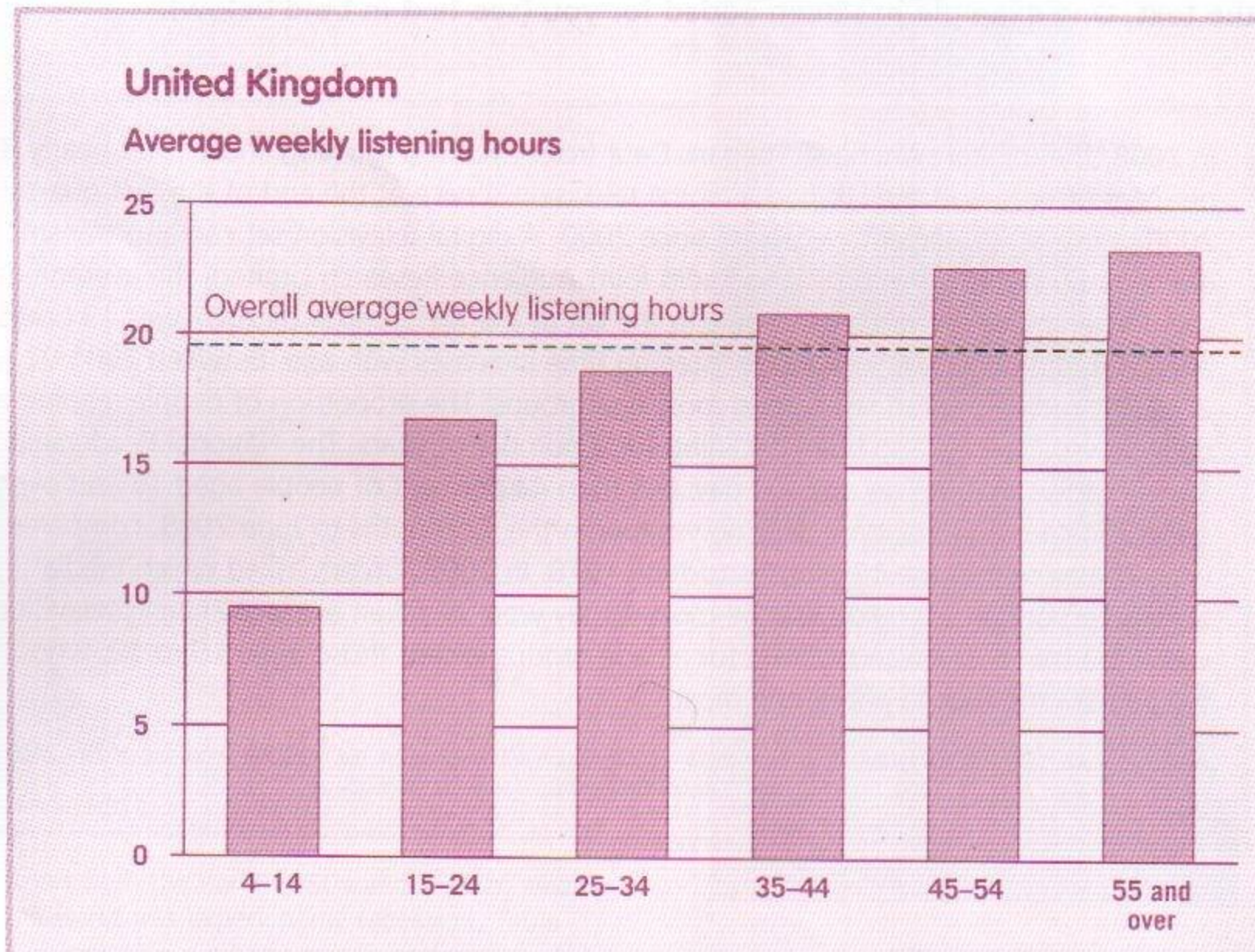
**Adapted from:** Self, A. (Ed.). (2008). *Social trends 38 – 2008 edition* and Hughes, M. (Ed.). (2009). *Social trends 39 – 2009 edition*. Retrieved April 21, 2009, from National Statistics Online: http://www.statistics.gov.uk

**Data 1**

| Great Britain | | | | Percentages |
|---|---|---|---|---|
| | 1978 | 1988 | 1998 | 2008 |
| The Sun | 29 | 25 | 21 | 16 |
| Daily Mail | 13 | 10 | 11 | 11 |
| Daily Mirror | 28 | 20 | 14 | 8 |
| The Daily Telegraph | 8 | 6 | 5 | 4 |
| The Times | 2 | 2 | 4 | 4 |
| Daily Express | 16 | 10 | 6 | 3 |
| Daily Star | . | 8 | 4 | 3 |
| The Guardian | 2 | 3 | 3 | 2 |
| The Independent | . | 2 | 2 | 1 |
| Financial Times | 2 | 2 | 1 | 1 |
| Any national newspaper | 72 | 67 | 56 | 44 |

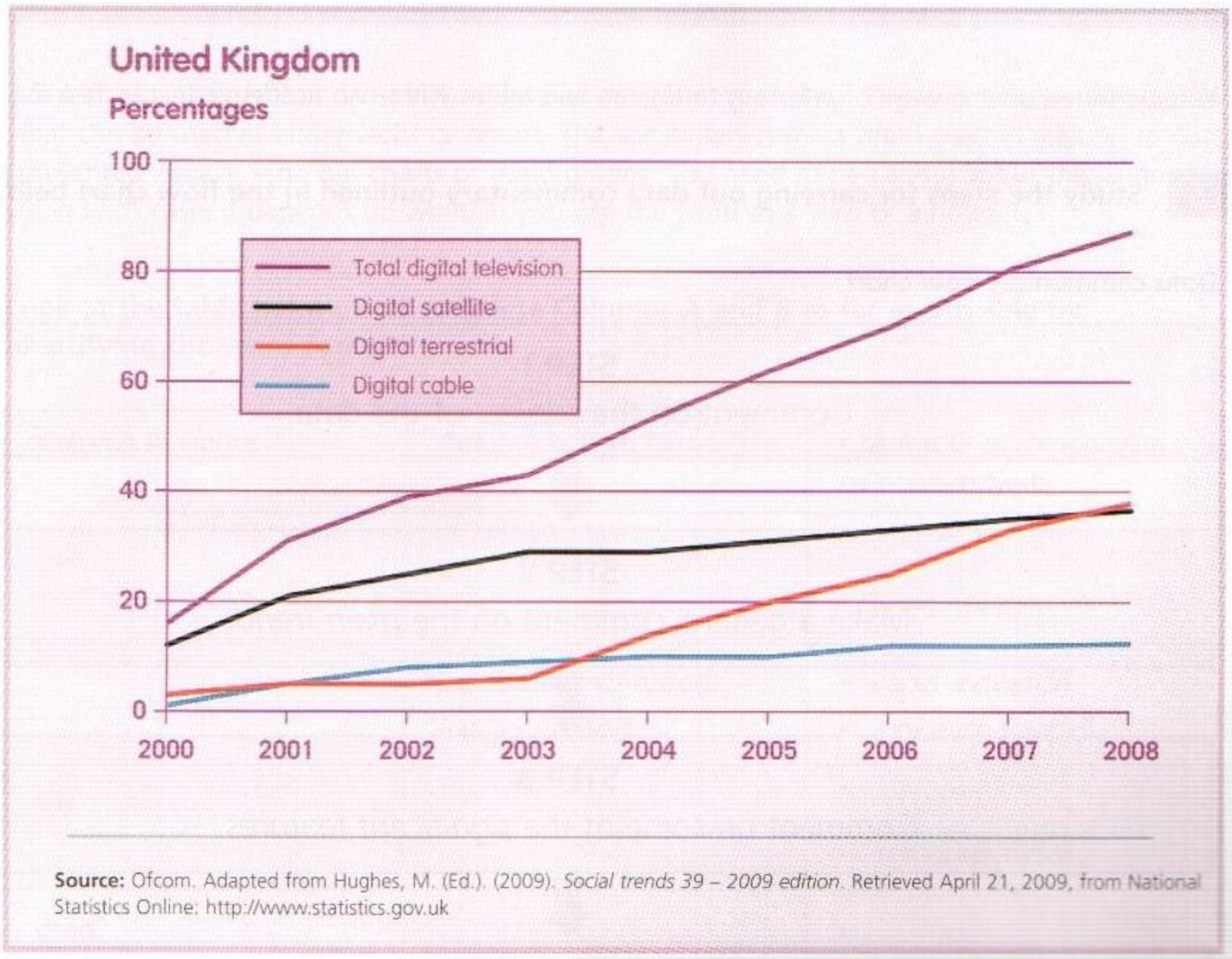
**Source:** National Readership Survey. Adapted from Hughes, M. (Ed.). (2009). *Social trends 39 – 2009 edition.* Retrieved April 21, 2009, from National Statistics Online: http://www.statistics.gov.uk

**Data 2**



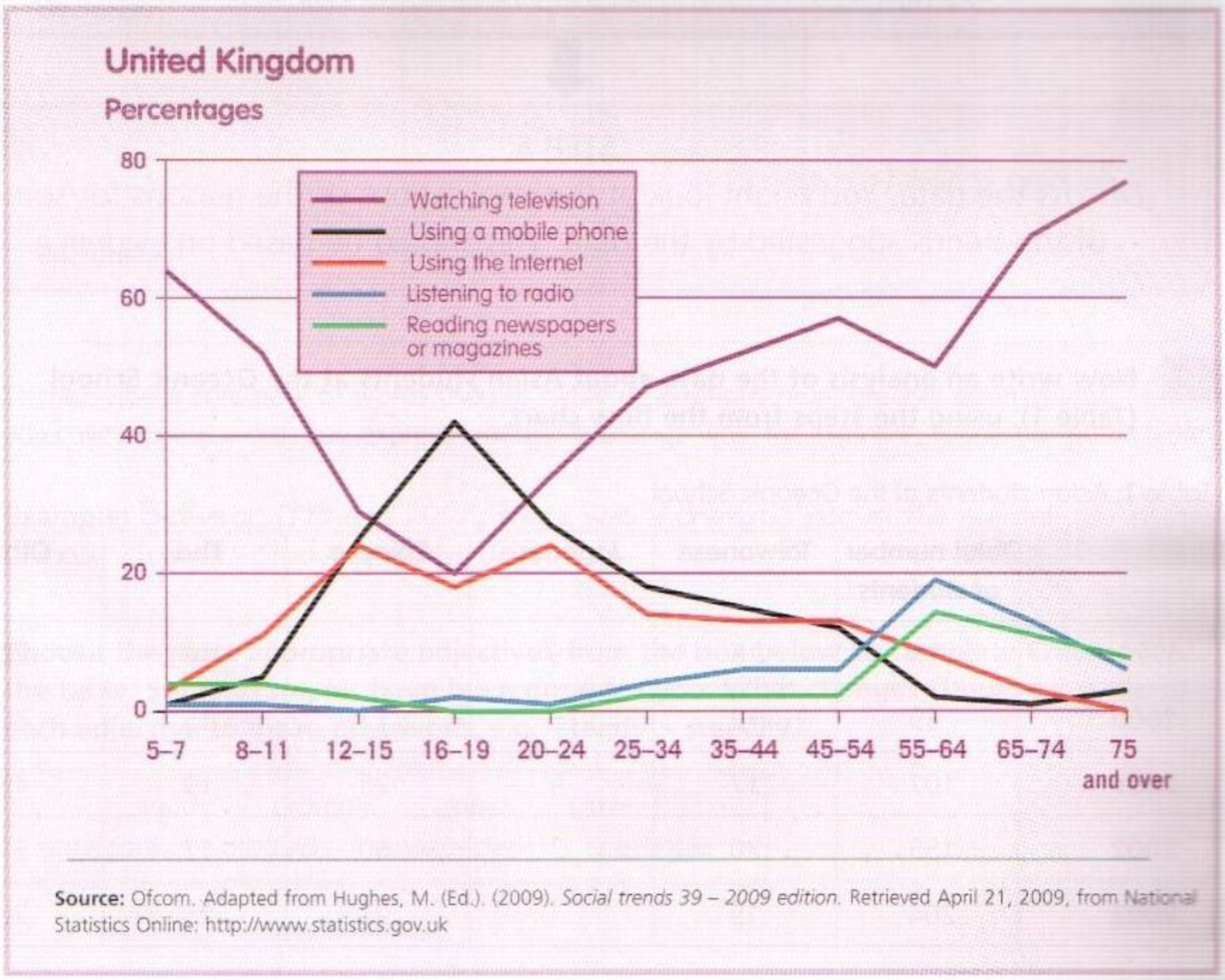

**Source:** Radio Joint Audience Research Limited. Adapted from Self, A. (Ed.). (2008). *Social trends 38 – 2008 edition.* Retrieved April 21, 2009, from National Statistics Online: http://www.statistics.gov.uk

**Data 3**




**Source:** Ofcom. Adapted from Hughes, M. (Ed.). (2009). *Social trends 39 – 2009 edition*. Retrieved April 21, 2009, from National Statistics Online: http://www.statistics.gov.uk

**Data 4**




**Source:** Ofcom. Adapted from Hughes, M. (Ed.). (2009). *Social trends 39 – 2009 edition*. Retrieved April 21, 2009, from National Statistics Online: http://www.statistics.gov.uk

## Task 3: Data commentary

You identified several ways of referring to figures and tables within an academic text in Task 2.

**3.1 Study the steps for carrying out data commentary outlined in the flow chart below.**

**Data commentary flow chart**

**STEP 1**
Comment on the *subject* of the data.

**STEP 2**
Make a general comment on the *main trend*.

**STEP 3**
Comment on some of the *significant features*.

**STEP 4**
If appropriate, *compare/contrast* various aspects of the data.

**STEP 5**
*Discuss* the data. You might look at the implications or the reasons for some of the trends suggested by the data. This should be based on evidence.

**3.2 Now write an analysis of the data about Asian students at the Oceanic School (Table 1), using the steps from the flow chart.**

**Table 1:** Asian students at the Oceanic School

| | Total number of students | Taiwanese | Japanese | Chinese | Thai | Other |
|---|---|---|---|---|---|---|
| **1999** | 73 | 15 | 15 | 9 | 14 | 20 |
| **2000** | 89 | 12 | 15 | 17 | 15 | 30 |
| **2001** | 107 | 17 | 9 | 23 | 13 | 45 |
| **2002** | 155 | 20 | 7 | 60 | 17 | 51 |
| **2003** | 204 | 19 | 7 | 93 | 15 | 70 |

## Task 4: The language of data commentary

There are some key words that constantly appear in descriptions of data. These include a core pool of words that can be used as either verbs or nouns. The vocabulary is most often used in relation to data that is presented visually, e.g., bar charts or trend graphs. You need to be careful about the language structure in each case; it depends on whether you use the word as a verb or a noun.

**4.1 Look at the table below, and complete Columns A and B as far as possible by identifying the word forms.**

| **Column A:** Nouns | **Column B:** Verb forms | **Column C:** Accompanying adjective/adverb |
|---|---|---|
| rise | | • <br>• rose steadily |
| | increase/increased/ has increased | • rapid increase <br>• increased rapidly |
| fall | | • <br>• fell dramatically |
| drop | | • <br>• |
| decrease | | • <br>• |
| | stabilize | • <br>• stabilized gradually |
| fluctuation | | • <br>• |

There is also a core pool of words used to make descriptions more precise: adverbs and adjectives. These words can express whether a change was, for example, sudden or predictable.

**Example:** Between 1999 and 2002, there was a dramatic rise in the number of Chinese students studying in the UK.

**4.2 Choose the most appropriate adjectives from the box below to complete Column C of the table. Some examples have been done for you. What changes should be made to each adjective to make an adverb, e.g., steady > steadily?**

| | | | |
|---|---|---|---|
| steady | dramatic | rapid | slow |
| significant | gradual | unexpected | noticeable |

**4.3** List other adjectives and adverbs that you could use to collocate with the nouns and verbs in Columns A and B of the table.

**Collocations**

## Task 5: Practice data commentary

**Write a data commentary on the information below, which compares UK employment trends in the service and manufacturing industries.**

Use the five steps suggested on page 90, as well as some of the language from Task 4.

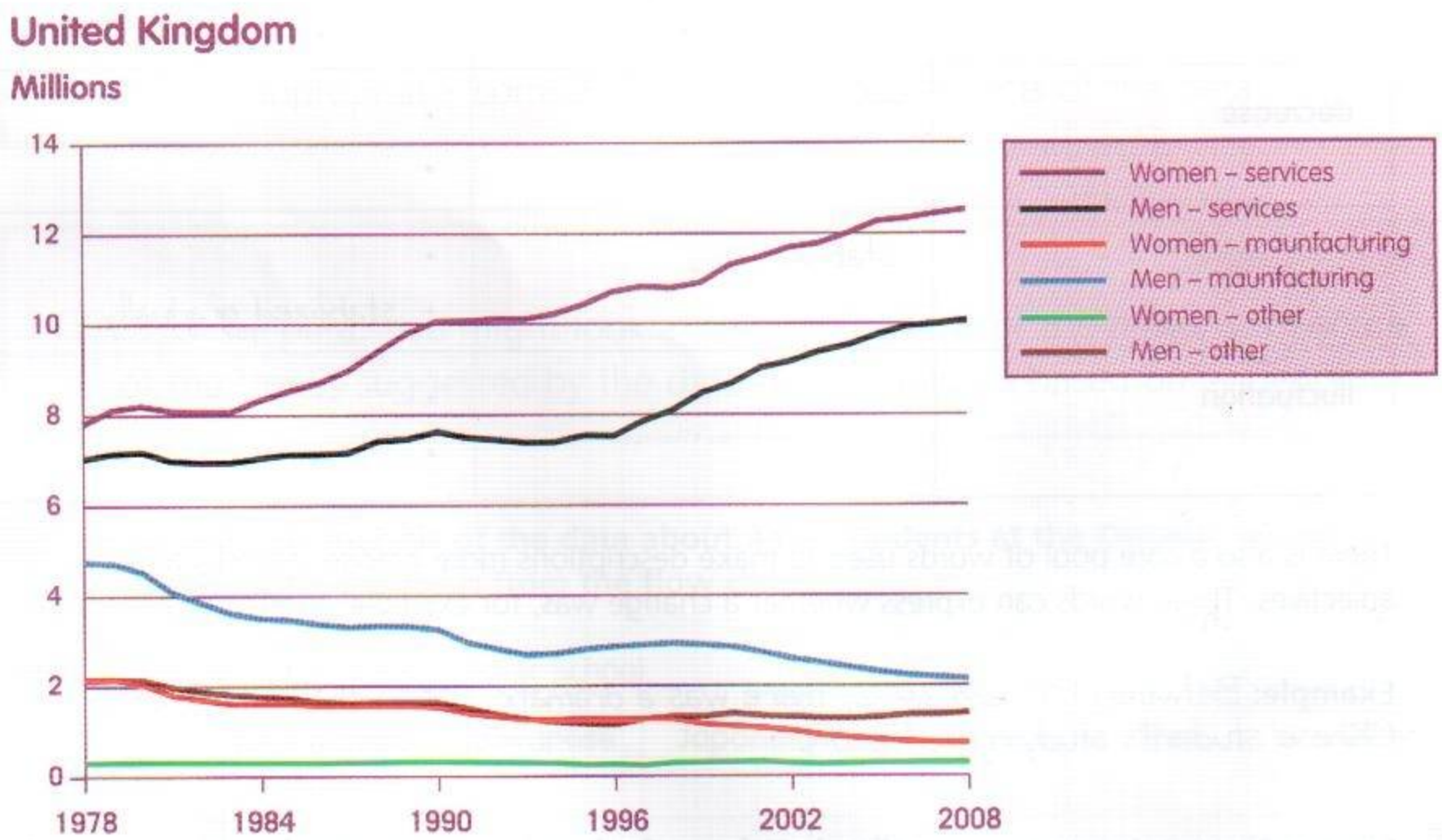



**Figure 1:** Employee jobs: by industry and sex (June each year)

**Source:** Short-Term Employment Surveys, Office for National Statistics. Adapted from Hughes, M. (Ed.). (2009). *Social trends 39 – 2009 edition*. Retrieved April 21, 2009, from National Statistics Online: http://www.statistics.gov.uk

## Unit Summary

In this unit, you have looked at how data is incorporated into academic texts and learnt how to analyze it. You have also practised using the language of data commentary.

**1 Decide which one of these statements is *not* true.**

a) Data should be used to support information and provide evidence that information is correct.

b) Data and illustrations should clarify ideas.

c) Data and illustrations should enhance an explanation.

d) Data and illustrations should be used to decorate a text and make it more appealing.

e) Data and illustrations should only be used if they have a definite purpose.

f) The writer should always refer to or comment on any data or illustration in the text.

**2 Highlight the option in each statement that is true for you.**

a) I *sometimes / usually / always* understand data and illustrations that support a text I am reading.

b) I *often don't / usually / always* know when I should use data to support my essays.

c) I am *not very / quite / very* confident about using the appropriate language to refer to data in the main text of my essays (expressions like *see Figure 1, this shows, the figures indicate*).

d) I am *not very / quite / very* confident about labelling and captioning data correctly.

e) I am *not very / quite / very* confident about using a range of appropriate language to describe data (phrases like *sharp rise, fell dramatically*).

**3 Complete each line as quickly as possible.**

a) two verbs that mean *go up* _____ _____

b) two verbs that mean *go down* _____ _____

c) another verb that describes trends in data _____

d) two nouns from the verbs in a and b _____ _____

e) two adjectives that collocate with the nouns in d _____ _____

f) two adverbs that collocate with the verbs in a and b _____ _____

**4 What are the most useful things you have learnt about using data in this unit?**

_____

_____

For web resources relevant to this unit, see:
**www.englishforacademicstudy.com/student/ewrs/links.php**

These weblinks will provide help with the vocabulary and grammar needed to describe trends, as well as a list of useful phrases for each stage of data commentary.

# 8 Preparing for conference presentations and editing your work

In this unit you will:

- analyze, evaluate and practise writing abstracts;
- prepare for an oral presentation using note cards and OHTs or PowerPoint;
- learn how to prepare a poster presentation;
- edit the final draft of your project.

## Introduction

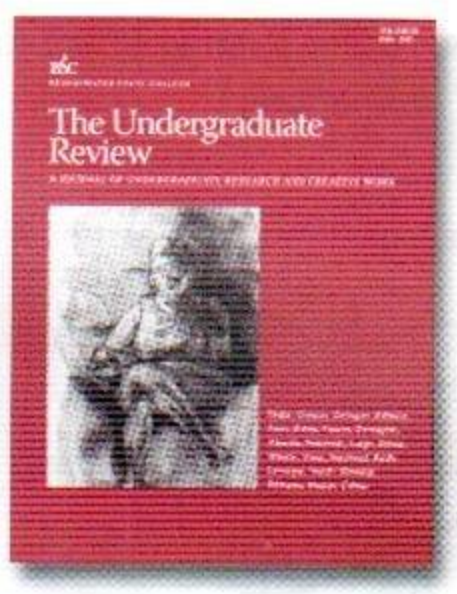
### Writing abstracts

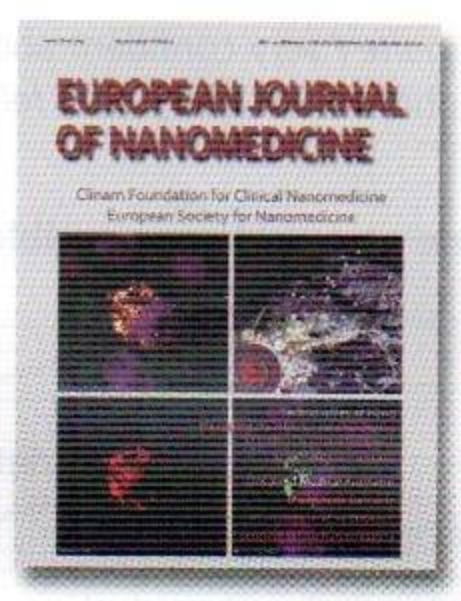
An abstract is a short summary of a whole project. It differs from an introduction, which may outline the structure of a project but does not include detailed findings. You may find it useful to look back at Unit 4, pages 56–59, to remind yourself of the purpose of writing an abstract and the typical features of abstracts.

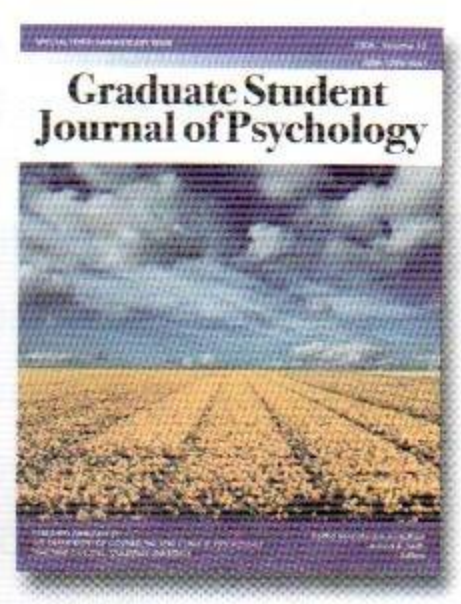
**Study tip**

Take careful note of the word limit when writing a conference abstract, and make sure you keep within it.

Abstracts may appear at the beginning of a piece of academic writing, such as an academic journal article, for example. They also appear in conference programmes. The purpose in both cases is to give either the reader or the conference delegate a brief overview of the contents of the article or presentation. The reader or delegate can then make an informed decision about whether that text or presentation is going to be of interest to them.




### Written project abstract

In this unit, you will develop your own abstract for the beginning of your own written project. It is best to write the abstract when you have completed the first draft of your project, so this is the appropriate time to begin. The length of an abstract can vary; for a 3,000-word essay, an abstract of 100–150 words would be appropriate.

Remember to include some of the features below:

**a)** a general statement;

**b)** essential background information;

**c)** the aims of the project;

**d)** an investigation into a particular topic or subject area;

**e)** the implementation of the investigation in a real-world situation;

**f)** how the text is organized;

**g)** details of the research carried out by the writer;

**h)** what the results of the research suggest;

**i)** a thesis statement;

**j)** a definition.

The aspects you include will depend on your subject area and the focus of your piece of work.

## Task 1: Features of abstracts

**1.1** **Look at these two sample abstracts, from written projects, and identify any features from the list above. Tick (✓) the appropriate rows in the table below.**

**Abstract 1**

### The evolution of foreign management consultancy firms in Italy and China: an evaluation of their localization processes

Management consultancy has been developing for more than one hundred years. It originated in the United States, before spreading to other countries. Localization plays an important role in the expansion of management consultancies. This, according to Crucini (1999, pp. 73–84), is the process of "adapting and translating management tools and ideas to work in a foreign market with a different economic or social background". The history of the spread of management consultancies is first described, followed by an outline of the localization processes of foreign management consultancy firms in Italy and China. Some common problems encountered in the processes are then identified. Finally, advice is given on how to achieve successful localization. (110 words)

**Abstract 2**

### The manufacturing industry in the Mexican economy: a competitiveness model

In Mexico, the meaning and use of the term 'competitiveness' has evolved significantly in recent times. The lack of agreement among Mexican economic agencies about the meaning of the term partially explains the economic situation in recent decades, and has been a core problem in industrial policy. This paper proposes a model to assess competitiveness, and explain its complex meaning. First, it reviews some important economic concepts from the literature. Then, the relevance of the industrial sector in the Mexican economy is explained. Next, the model is applied to a specific situation in the manufacturing industry. The main conclusion is that this simple concept could be the beginning of a more sophisticated tool for implementing industrial policy in Mexico. (119 words)

| Feature | Abstract 1 | Abstract 2 |
|---|---|---|
| a | | |
| b | | |
| c | | |
| d | | |
| e | | |

| Feature | Abstract 1 | Abstract 2 |
|---|---|---|
| f | | |
| g | | |
| h | | |
| i | | |
| j | | |

**1.2** Write an abstract for your written project in the box below. Write inside the box only. Try writing your abstract from memory, without looking at your project.

**1.3** Exchange your abstract with a partner. Which features from the list on pages 94–95 can you identify in her/his work?

**Abstract for written project**

## Task 2: Conference abstracts

If you are participating in a conference, you will need to write a short abstract, of 60 words, for example, to appear in the programme. It will summarize the contents of your presentation.

Before you write a conference abstract, you need to decide which aspect of your project you will focus on. The time you have to give a presentation is limited, so you will not be able to include everything. The next two tasks look at some examples of conference abstracts and factors to consider when preparing for your presentation.

**Study tip**

When writing a conference abstract, think carefully about who your audience might be. Your abstract should focus on the main purpose of the presentation.

**2.1** **Look at abstracts A–F, on pages 97–98, and match the abstracts to the titles below.**

- *Banking systems and management: challenges facing Taiwanese banks*
- *Foreign investment in China*
- *Communication management in Transmission Control Protocol (TCP)*
- *Interpretation and analysis of financial statements for non-accountants*
- *Mixed-use developments in the Kingdom of Saudi Arabia*
- *Situation analysis in marketing*

**Abstract A**

Analyzing the marketing situation is the first step that companies have to take when they make a marketing plan. This paper will describe the three frameworks of situation analysis and outline how Japanese frameworks compare with Western company frameworks. (39 words)

**Abstract B**

Financial statements can be used as a tool for decision-making, planning and control by various user groups. The objective of this presentation is to describe how to globally transmit annual reports to non-specialist groups in accounting. Currently, some countries, including Thailand, are facing economic crises. This is owing to businessmen and women not properly understanding the meaning of financial statements, and making poorly informed decisions for their corporations. (68 words)

**Abstract C**

This presentation explains the basics of computer networks and Transmission Control Protocol (TCP). It discusses the behaviour of TCPs in abnormal events as connections are being opened. Following this, normal closing processes and abnormal situations are explained. Finally, a Finite-State-Machine-Model is used to illustrate the status of the TCP unit during opening or closing of connections. (56 words)

**Abstract D**

In the history of urban development, the use of the land in one relatively discrete area for a variety of purposes, for example, for residences, trade, employment and entertainment, has often been practised. The evolution of mixed-use developments was based on the idea of compact land use developments in areas with overgrown populations. This practice of mixed-use developments will be discussed with reference to the Kingdom of Saudi Arabia. (68 words)

**Abstract E**

Since 1997, China has made a great improvement in its economy, and has become the economic centre of Asia. Foreign investment is the most obvious contributor to this performance, and has encouraged China's economic development. The purpose of this project is to analyze the investment environment in China, particularly the development and impact of foreign investment. (56 words)

### Abstract F

In an economic system, banks not only facilitate the matching of funds between savers and investors, but are also the main institutions for executing monetary policies. These policies need to be evaluated, and the 'CAMEL' model is one of the most effective ways to assess banking performance. This presentation attempts to evaluate the five criteria on which the 'CAMEL' model is based, and then applies them to the Taiwanese system of banking. (72 words)

**2.2 Practise writing a conference abstract, based on your project, in the box below.**

Keep your abstract as brief as possible (maximum 60 words).

**Abstract for conference presentation**

**2.3 In small groups and/or with your teacher, edit and discuss each other's abstracts. Pay attention to the typical features of abstracts and discuss content and language.**

## Task 3: Preparing an oral presentation

There are various ways of remembering what you want to say, and the order you want to say it in, when giving a presentation. For example, some presenters prepare note cards, on which they write down the main points of their presentation in the order they are going to discuss them. They write the notes clearly, with lots of space between each point, and arrange the note cards in numerical order.

**Study tip**

Good presenters do not read their notes aloud; they just use them as a way of reminding themselves of what to say.

**3.1** **Study the following example of a note card prepared by a student who is going to give a presentation on International Relations. In what ways is this useful for the presenter?**

CAUSES OF THE COLD WAR

a) Decline in relations – United States/Soviet Union

b) Nuclear arms race

c) Results of World War II

**3.2** **Discuss what you think about the note card with a partner.**

**3.3** **Look at the following presentation titles, which were chosen by students on a pre-sessional course. Prepare a set of note cards on one of these topics that will give you enough information to speak for two minutes.**

- *The retail trade in China: why native enterprises often fail*
- *Modern migration and its economic impact*
- *The causes and effects of climate change in recent years*

Note that a PowerPoint slide or overhead transparency (OHT) can be used as a stimulus for memory in the same way as a note card. However, such visual aids are mainly used as a way of clearly illustrating the key points of the presentation to the listening audience.

**3.4** **Below is an example of a slide that might be used by a student who had written an extended essay with the following title: *Remembering and forgetting: to what extent can we improve memory?* Discuss the slide with a partner.**

**a)** In what ways is it similar to a note card?

**b)** How is it different?

# Remembering and forgetting

**A. Definition**

'Memory is one of the higher brain functions, and is crucial to normal functioning of the mind and to the phenomenon of consciousness.'
(Cohen, 1996, p. 89)

**B. Relationship between remembering and forgetting**

- Importance of memory
- Reasons for memory loss

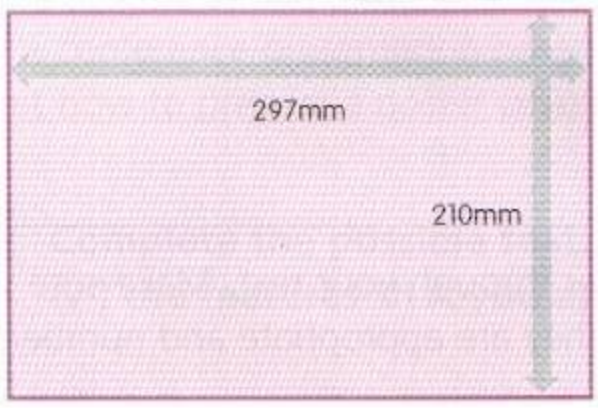
**C. Improving the memory**

## Task 4: Preparing a poster presentation

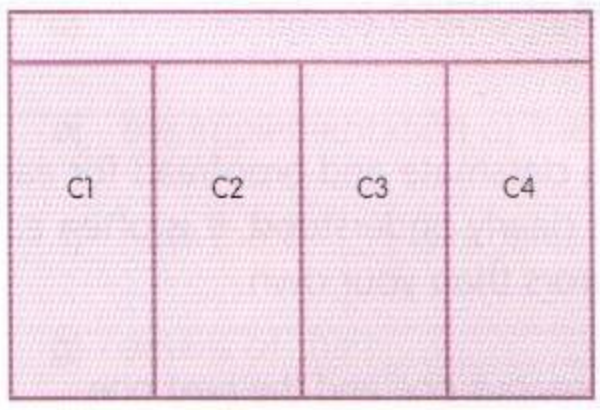
The purpose of a poster is to present ideas clearly and concisely. The main point of a poster should be immediately clear to the audience when they first see it, so you need to think carefully about the impact. Make sure you are selective – if you try to communicate too many ideas on a poster, your main idea will be lost.

**Produce your own poster presentation, based on the following steps.**

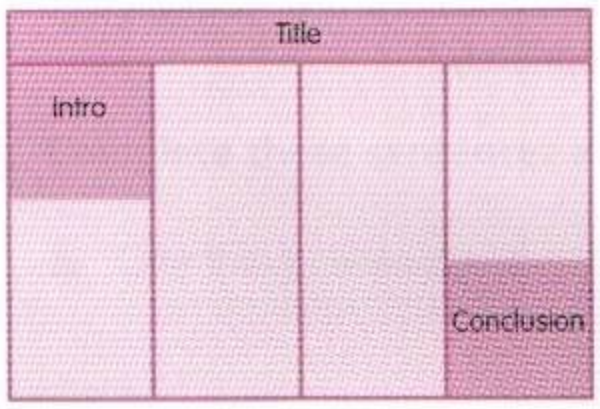
**a)** Make a sketch of the poster, using an A4 sheet of paper.




**b)** Arrange the contents in a series of three, four or five columns. This will facilitate the flow of people past the poster.




**c)** Put the elements of the poster in position.




The title will appear across the top. A brief introduction (three to five sentences) will appear at the upper left. The conclusions will appear at the lower right. Method and results will fill the remaining space.

## Guidelines for designing a poster

- It should have a strong visual impact.
- Ideas should be clear and comprehensive.
- It should be easy for the audience to follow.

## Editing your written work

Very often, students work to deadlines, and they hand in tasks at the last moment. Two hours spent on editing your work can make all the difference between creating the impression of a sloppy, careless piece of work and presenting one that is thoughtful and well executed. Below are some guidelines to use as a checklist when editing.

| | |
|---|---|
| **Title page** | See the example below. |
| **Headings** | Headings are a way of guiding the reader through your text. Make sure you have used enough of them. Make sure they are appropriate and numbered correctly (if you are using numbers). |
| **References** | Make sure you have acknowledged any ideas you have used from sources. Check each reference thoroughly, to ensure you have worded it in the correct way (author's surname, date). |
| **Bibliography** | Check that your bibliography is arranged according to academic convention. Make sure it is in alphabetical order. |
| **Language** | If possible, exchange your project with a classmate and proofread for each other, to make sure each section can be clearly understood. It is often easier to identify another person's language errors than your own. |
| **Linking of ideas** | Check that each section is related to the previous one and the next one. |
| **Introduction and conclusion** | Check your introduction and conclusion. Is each one linked to your title? |
| **Feedback** | Check the feedback from your tutor on previous drafts of your project. Have you reacted to this feedback appropriately? |

## Example title page

**UNIVERSITY OF READING**

**CENTRE FOR APPLIED LANGUAGE STUDIES**
**PRE-SESSIONAL COURSE BLOCK X 2008**

Learner Independence and Self-Evaluation

**Hernandez Marta**

Tutor: Peter Granger
September 2008

## Unit Summary

In this unit, you have analyzed and evaluated abstracts and written an abstract for both your project and a conference presentation based on your project. You have also prepared for an oral presentation, learnt how to prepare a poster presentation, and looked at how to edit the final draft of your project.

**1** **Complete the possible features of an abstract, below, in the spaces provided. Then tick (✓) the features that you applied to the abstract you wrote for your project.**

**a)** a g_____ statement ☐

**b)** essential b_____ information ☐

**c)** the a_____ of the project ☐

**d)** an investigation into a particular topic or s_____ area ☐

**e)** the implementation of the investigation in a r_____ - _____ situation ☐

**f)** how the t_____ is organized ☐

**g)** details of the r_____ carried out by the writer ☐

**h)** what the r_____ of the research suggest ☐

**i)** a th_____ statement ☐

**j)** a def_____ ☐

**2** **Complete these sentences about the conference abstract you wrote for your project.**

**a)** One thing I liked about my conference abstract was _____

_____.

**b)** One thing I wasn't so happy with was _____

_____.

**3** **Complete the sentence below about using note cards when giving an oral presentation.**

Using note cards is a good idea because _____

_____.

**4** **Complete this advice about poster presentations with some of the words and phrases from the box.**

| main point | experts | concise | audience | details | complicated | impact |
|---|---|---|---|---|---|---|

A poster presentation must be clear and _____. The main point must be immediately clear to your _____, so you need to think carefully about _____. You must be selective – if you try to communicate too many ideas, your _____ will be lost.

**5** **Another student has asked you for advice about editing written work before handing it in. Think of one piece of advice you could give about each of the following:**

**a)** heading;

**b)** references;

**c)** bibliography;

**d)** language used;

**e)** linking ideas;

**f)** introduction and conclusion;

**g)** previous feedback from tutors.

**6** **Which aspects of your project were you happy with? What would you like to do better next time?**

For web resources relevant to this unit, see:
**www.englishforacademicstudy.com/student/ewrs/links**

These weblinks will provide you with further help on writing an abstract, some additional information on designing a poster presentation, a comprehensive list of tips on how to design, organize and structure academic presentations, and innovative ideas on how to approach different stages in the writing process.

# g Glossary

**Abstract**
A short summary of the main points of an academic text that is written after a paper has been completed, when the author has a clear idea of the content. An abstract is written to give the reader a brief overview of a journal article, for example.

**Academic conventions**
Written and unwritten rules for the way things are carried out within the university world. For example, written work has to be referenced in a particular way.

**Academic literature**
Existing textbooks, research and discussion papers that may be referred to in extended academic writing.

**Academic paper**
A piece of academic writing containing original research or reviews of existing research. A paper that is published in an academic journal would also be referred to as an *academic article*.

**Academic proof**
Written evidence from a reliable academic source to support an argument.

**Academic weight**
The authority that is given to an argument, whether written or spoken, by the inclusion of references to reliable academic sources.

**Analytical reading**
Reading a text critically by considering the validity of its content.

**Analytical writing**
Writing that involves examining a text, theory or set of ideas.

**Annotate**
To write comments or explanatory notes directly onto a text, e.g., in the margin.

**Bibliography**
A list of written sources, such as books, articles or websites, that have been used in a piece of writing.

**Blurb**
The publicity information about a book, written to attract the attention of the reader, usually found on the back cover.

**Brainstorming**
Working alone or with others in a group to generate a large number of ideas. Everyone suggests as many possible ways as they can to solve a problem or complete a task.

**Browse a text**
To read with no particular aim in mind, e.g., glancing over several pages and checking a few sentences or a heading, or randomly opening a book at a page to read a few lines or paragraphs as a taster.

**Caption**
A brief description of the content of figures, tables or illustrations.

**Case study**
A study of the development of a person, group or situation over a period of time.

**Circular definition**
A definition that uses the word or phrase being defined as part of the definition, e.g., 'an extended writing class is a class where students learn to write extended essays.'

**Cite (sources)**
To refer to the source of an idea used in academic work. This may be an in-text reference to an author, a reference in a bibliography or footnote or a verbal reference in a talk or lecture.

**Critical thinking skills**
Thinking critically includes the following skills: supporting your own views with a clear rationale; evaluating ideas that you hear and read; and making connections between ideas, as well as detecting and identifying bias.

**Data commentary**
The description of trends in tables or figures within academic writing, for example, 'there has been a steady increase in sales, as seen in Figure 1.'

**Descriptive writing**
Writing that gives a clear and detailed impression of what something is like, how something works or what has been said or done.

**Direct quotation**
The use of a writer's exact words, within inverted commas or in italics.

**Discursive writing**
Writing based on the presentation of ideas, with arguments and evidence to support them.

**Dissertation**
A formal piece of writing normally produced for the purposes of a university degree.

**Encapsulate (an idea)**
To express an idea in a clear, brief and concise way.

**Establishing a clear focus**
Narrowing down a general topic into something more specific that can be addressed clearly within a piece of extended writing.

**Evaluative writing**
Writing that presents a balanced argument, taking into consideration all aspects of a topic and drawing a conclusion based on the ideas presented.

**Evidence**
Supporting statements from reliable sources that provide proof for what is being stated.

**Extended definition**
This is longer and more detailed than a simple dictionary-style definition. It may contain supporting examples and/or a contrast with other similar, but distinct, concepts.

**Extended writing**
In the context of university study, extended writing is a means through which students can express views, display knowledge and demonstrate an ability to use evidence to refute or support existing theories in considerable detail.

**Extensive reading**
This generally involves reading several sources, some of which may be quite long and detailed. It therefore requires a clear purpose and a selective approach.

**Formal definition**
A definition from an acknowledged source, such as a dictionary or an expert in the field.

**Framing a title**
Structuring an essay title in a certain way, in order to elicit specific responses from the writer. For example, a title may be presented in the form of a question or a statement.

**Hypothesis**
Something that is assumed to be true for the purpose of an investigation or argument.

**Inform**
A major purpose of academic writing is to inform, i.e., to provide information that is either new to the reader or presented from a new or different point of view.

**Interacting with the text**
This involves taking a critical approach to reading, making the reader an active participant in the process.

**Journal article**
An academic paper that has been published in a journal and has to conform to the particular format set out by that journal. It will generally include an abstract, an introduction and a conclusion as well as the main body and references. Articles in serious scientific journals have to be peer reviewed, i.e., reviewed by a recognized person in the profession.

**Logical conclusion**
A conclusion based on clear, consistent reasoning and which follows from the development of the essay.

**Main argument**
Academic papers normally contain at least one main argument, or thesis, which the paper seeks to address.

**Oral presentation**
A short lecture, talk or demonstration (usually formal) given in front of an audience. The speaker prepares and structures a presentation in advance and will often use visual aids to illustrate it.

**Paraphrase**
A rewritten version of a writer or speaker's idea, usually relating to a specific point that the writer has made, with an acknowledgement of the source.

**Persuade**
A major purpose of academic writing is to persuade, i.e., to convince the reader of a particular point of view, which the writer sets out in her/his work.

**Plagiarism**
Reproducing sections of another writer's material and claiming it as your own, whether in the form of long chunks of text or short lines or phrases. This practice is unacceptable in academic writing. Any reproduction of another writer's work has to be clearly acknowledged.

**Poster presentation**
A visual display, incorporating information and pictures or diagrams. The audience generally reads the poster while the presenter stands next to it and provides additional explanation.

**Referencing**
Acknowledging the quotations of other writers in a way that is academically acceptable, for example, using the APA style. This involves acknowledgement within the text and a full bibliographical reference at the end. There are a number of different referencing systems. The system used may depend on the location of the institution, or on the disciplines within that institution.

**Refute/support (an argument)**
A major purpose of academic writing is to use reason and proof to show agreement with (support) or disagree with (refute) an argument that is held by others in the same field.

**Reiterate ideas**
To explain ideas that have already been mentioned in a different way.

**Relevant information**
Information that directly or indirectly addresses the issues within the chosen topic.

**Scanning**
Reading in order to find specific information. For example, it is normal to scan a text to find dates, names or facts. In such cases, the reader knows what s/he is looking for.

**Shared knowledge**
Information that, it can be assumed, is understood by the reader of the particular piece of writing. An example might be that global warming is the result of human activity.

**Skimming**
Reading in order to understand the general idea or gist of a text. This involves reading the text quickly to take in the main points, rather than focusing on every word. For example, it is normal to skim a letter or book cover to find out what it is about. This often precedes reading for more specific information.

**Stance**
The point of view of the writer, which is normally established in the thesis statement and is then developed and exemplified in the remaining text.

**Summarizing**
Stating clearly and succinctly the key ideas of an argument in your own words, with an acknowledgement of the source.

**Support/refute an argument**
A major purpose of academic writing is to use reason and proof to show agreement with (support) or disagree with (refute) an argument that is held by others in the same field.

**Synthesizing**
Compiling and organizing different views in a way that shows their relationship and the differences between them.

**Thesis**
A writer's point of view or position on the main issue addressed within a text may be referred to as her/his thesis. In order to write an evaluative project, the writer needs to develop a thesis as the starting point.

**Thesis statement**
This expression of the writer's thesis is a key element of the introduction to an academic text, which directs the reader and helps to focus the content. The thesis is then supported by evidence and reasoning in the main body of the essay or presentation.

**Tutorial**
Usually a private meeting between a student and a tutor (a teacher or lecturer) who has been assigned to provide her/him with help and support.

## APPENDIX 1: Sample project

**University of Reading**

Pre-sessional Course Block 4
September 2008

# To what extent should insider dealing be regulated, and how can this be done effectively?

Name: Mansoor Alhagbani

Date: 19 September 2008

University of Reading

# Abstract

Insider dealing is considered a financial crime in many countries. This criminalization of insider dealing is recent and regulators have been struggling to control it, as it is a complex situation. Furthermore, regulating insider dealing has never gained a consensus, as many economists and lawyers think it should not be regulated. This paper tries to analyse this activity from different perspectives, by first defining insider dealing and looking at how it happens. Then the argument for legalising insider dealing is analysed, and a discussion about why it is flawed is presented. Finally this paper suggests that a proactive approach is the most effective way to regulate insider dealing.

# Introduction

Financial markets in many countries such as the UK, USA, and Saudi Arabia constitute an integral part of the domestic economy and help create a sound market. This task requires providing a market where efficiency and market integrity are dominant characteristics. In other words, in order to have an attractive market, where shares are traded, the performance of companies that should be reflected are quoted in it. Wrongdoing in general is a stumbling block to ensuring an efficient market. It is the job of regulatory bodies to eliminate such obstacles. However, some forms of wrongdoing are difficult to combat not to mention the opposition against criminalizing them. Insider dealing is such a subject. Suter considers insider dealing one of the most challenging topics that have been encountered by legislators (Suter, 1987, p. 1). This may be due to two main reasons. First, the opposition against regulating insider dealing. There are many economists and lawyers who advocate a deregulated insider dealing for many reasons that will be dealt with in more depth later on in this essay. Moreover, if the battle over regulating insider trading is won by those who are in favour of regulating it, there will be another issue, which is the difficulty, although not an impossibility, of imposing effective regulation due to the complexity of the controversial crime. Nevertheless, all forms of insider dealing should be regulated. A possible way of doing this effectively may be through a proactive approach. This essay will first define insider dealing and examine when it is committed. Secondly, it will look at the argument against regulating insider dealing and why this is inadequate. Finally, it will discuss how insider dealing could be regulated effectively, by taking a proactive approach.

# Definition

The definition of insider dealing is absolutely vital as an inadequate definition may create a loophole through which the crime might be committed without, if proved, successful prosecution. The "traditional view" of insider dealing is defined by Hannibal as "the use by an insider of price-sensitive information (known to him but not generally and which he has acquired by virtue of his position) to trade to his advantage in the shares of a company" (McVea, 1993, p. 42). The 'insider' in this definition is someone who is likely to come across information (as part of his/her job) that is not known by the public. This information has to be price sensitive, which means that once it is made public it is likely to provoke a movement in the price of certain shares (McVea, 1993). However, this definition, if not complemented by other rules, will be flawed from a legal viewpoint. This is true as the definition merely covers the deal when it is traded to the insider's advantage. The insider can easily avoid this by passing the confidential information to a relative such as his wife, or even more cautiously the insider may recommend his wife to buy or sell in particular shares without revealing the information. In this case and according to that definition a crime is not constituted, despite an advantage being gained from the confidential information. Therefore, the definition that will be used to criminalize insider dealing has to cover all possible forms of abusing confidential price-sensitive information, or alternatively complemented by additional rules. For example, in the UK the CSA Act 1985 amended by the FSA 1986 does not define insider trading, yet the Act differentiates between direct insider dealing, mentioned in the definition above, and indirect or "secondary" insider dealing (ibid., p. 69). The latter criminalizes the incident in which an insider makes recommendations, based on confidential information, to another person to trade. Both of them will be liable for insider dealing if the recipient knows that the recommendation is based on confidential information, and only the insider will be liable for the crime if the recipient does not know (ibid., p. 75). This approach ensures that all forms of abusing information will be considered as insider dealing. Nevertheless, it must be borne in mind that criminalizing an action does not mean prosecuting anyone who has carried it out, it means that anyone who carries it out will be prosecuted *if there is sufficient evidence*. It is this issue of evidence that makes insider dealing a difficult action to control.

Having clarified what insider dealing is and what elements constitute such an action, it is important to decide whether such an action should be considered a crime or not. In many countries such as the UK, the USA and Saudi Arabia, insider dealing is a financial crime. However, numerous lawyers and economists disapprove of this criminalizing of insider dealing. Their argument centres around three main justifications for insider dealing.

# The economic benefit of insider trading

First, the economic benefit that insider trading brings about. Donald J. Boudreaux, a distinguished economist, claims that insider trading is beneficial in the sense that it gives an immediate reflection of the information generated by a certain company. He argues that when insiders of a company buy or sell shares in their company according to specific information, this implies to the public that some information is available, even before it is announced. In other words, if insiders start to buy shares, outsiders or other investors can anticipate that good news is about to be announced and therefore imitate the insiders in their actions (Boudreaux 2003). Marine, a very well known lawyer who wrote a book in 1966 condemning the criminalization of insider dealing, agrees with Boudreaux on this point (McVea, 1993, p. 54). This view seems to ignore the fact that profiting in an efficient financial market should be based on the investors' abilities to analyse information, not to imitate other traders while perhaps the information available to them suggests doing the contrary. McVea argues that the economic benefit argument is flawed in two ways; he asserts that such a phenomenon would encourage insiders to delay the announcement of the information as they accumulate quietly and leisurely, in order not to be noticed by outsiders, a vast number of stocks so when the information comes out the price soars (ibid., p. 54). He also argues that the price at such a stage would be an "artificial one" and this is a "distortion" of the market that will affect efficiency and dent public confidence (ibid., p. 55). Therefore, it seems that the economic argument for legalising insider dealing provides no ground upon which insider dealing can be legitimised.

# Insider trading as an incentive for workers

As well as the economic argument for legalising insider trading, Marine put forward another argument, which is that insider dealing should be used as an incentive for the personnel of conglomerates (McVea, 1993, p. 51). He believes that since managers and directors contribute to a great extent to the increase of the organisation's wealth, salaries are not adequate to reward them. He therefore believes that they ought to be able to take advantage of the information that they exclusively possess to trade in the company's shares (ibid.). Otherwise "innovation", which increases profits and is essential to any company's success, would not be encouraged and therefore the company would be worse off (ibid.). This scheme of rewarding managers and directors, although it will increase their income quite substantially, will not necessarily boost the company's performance. An insider can make use of both good and bad news. Use can be made of the good news by buying and of the bad news by selling. Here a manager will benefit from generating bad news to the company by avoiding loss (ibid., p. 52). This means creating a kind of rewarding scheme that is not "commensurate with effort", which should be the basis of any rewarding scheme (ibid.). Furthermore, using trading upon insider dealing as a perk or a scheme of rewarding is extremely unfair. This can be seen when considering that confidential information is provided to an employee as a result of his or her position regardless of his/her contribution to this information. For example, a manager who has been performing very badly is likely to come across price-sensitive information and trade upon it. At the same time another employee who has been performing extremely well may be unable to access the same information. This means that employees will be rewarded according to their position and regardless of their actual performance. Again and for the above reasons, Marine's argument cannot justify legalising insider dealing.

# The 'impossibility' of effective regulation of insider trading

Finally, the advocates of unregulated insider dealing argue that insider dealing cannot be regulated properly and it is impossible to have effective regulation, thus it should not be regulated. Insider trading is a very complex crime and detecting it can be impossible in some cases. For example the defendant can claim that they did not know that the information was price sensitive or they may argue that they would have traded even if they had not known about the information (Cole, 2007). This makes successful prosecution extremely difficult. Margaret Cole (2007), the Director of Enforcement at the FSA, conceded that prosecuting an insider is extremely challenging. She stated that not only proving the elements of the crime is difficult but also "the practical challenges of presenting complex insider dealing cases to a jury are immense" (ibid.). However, while Marine sees this obstacle as a justification to legalise insider dealing, Margaret Cole does not. McVea (1993, p. 57) summarised Marine's argument as "anti-insider dealing law is unenforceable; unenforceable law is a bad law; bad law should not be on the statute books". Then McVea (ibid.) criticised Marine's argument by stating that "partial enforcement" on undesirable actions such as insider dealing is better than not having any restrictions. McVea's argument seems to suggest that even if it is impossible to control insider dealing, it is still an immoral activity and regulators should not approve of it by not criminalizing it. Furthermore, despite being a really difficult crime to detect, insider trading can be tackled. This will not be achieved by the capacity to prosecute every insider, rather it may be accomplished through preventing insider trading from occurring. In other words, a proactive approach may well be the remedy to this obstacle.

# A proactive approach

The introduction of a proactive approach aims to reduce the occurrence of insider dealing as much as possible. This can be achieved by restricting the flow of information between conglomerate departments. For example, information gained by the marketing division should not be passed on to the investment division. This restriction may have a negative effect on financial conglomerates as it will restrict the liaison between internal departments, but not to the extent that it should be abandoned (McVea, 1993, p. 350). Furthermore, this policy will be effective in terms of reducing insider dealing among financial conglomerates rather than all the quoted companies and individuals involved. This can be complemented by a more holistic approach which is forcing companies listed on the stock market to disclose all information once they gain it. This will eliminate the benefit of trading upon inside information as it will be known to the public immediately. Disclosure and transparency as two rules to which companies have to adhere are already imposed in many markets; however, not efficiently enough to eliminate the occurrence of insider dealing. Margaret Cole (2007), the Director of Enforcement at the FSA, asserts that the FSA "put a significant emphasis" on proactive policies such as ensuring "a steady flow of information". The FSA in this sense has accomplished encouraging results. Figures show that the level of undesirable activities including insider dealing plummeted from 19.6% in 1998–2000 to 2% in 2004–2005 (Cole, 2007). This reduction is clearly the result of the proactive measures. Yet the figures also show no reduction in illegal activities when it comes to dealing upon information to do with mergers and acquisitions and this is mainly due to the huge number of people involved in such a process, and therefore the higher likelihood of information leakage (ibid.). However, the FSA is working on coordinating between the different parties in order to overcome this issue. Despite this, the overall reduction shows that the FSA succeeded in preventing a great deal of insider dealing from taking place. This means that a proactive approach can be effective and Marine's argument in this regard is no longer valid.

# Conclusion

In conclusion, a perfect market where no kind of wrongdoing is taking place can be an unrealistic ambition. Nevertheless, market regulators ought to do their utmost in combating all forms of wrongdoing in order to provide the highest possible level of market integrity, which will attract investors from all over the world. Insider dealing as a form of wrongdoing, as previously mentioned, is rather controversial. Many lawyers and economists believe that insider dealing is efficient and beneficial not only for insiders but also for outsiders. This argument was not compelling enough to persuade major economies such as the USA, UK and Japan to legalise the controversial crime. Rather, those countries and many others opted to fight insider trading and follow the argument that insider dealing is neither efficient nor beneficial for outsiders. When doing this, the supporters of legal insider trading believe that regulators and authorities will be spending a great deal of money and time in vain. They are convinced that even if insider trading were to be regulated, there are no means to combat it. This is mainly due to the complexity of this action and the elements that constitute it. However, although insider dealing is an extremely difficult action to detect, combating it can be achieved by preventing it. This approach has shown great results in the UK market. Yet this policy can be developed to be more effective and less harmful to companies as they may be affected by the restricted liaison between different departments. In other words, a proactive approach is the right solution and regulators ought to work on improving this policy in terms of both preventing insider dealing and not affecting the performance of organisations. This task, despite being extremely difficult, has to be done, as regulators ought to do their utmost to provide the highest possible level of market integrity.

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# APPENDIX 2: Self-evaluation checklist

Below is a list of the skills* you will need when working on extended pieces of writing during your university career. The work you do in this book, as well as on other aspects of your pre-sessional course, will help you develop these skills. Tick the appropriate box for each skill, according to how well you feel you can do this. From time to time, look again at this checklist and decide whether you have made progress with any of these skills.

| SKILLS | Do not know about this | Find this difficult/ cannot do this | Can partially do this | Can do this well |
|---|---|---|---|---|
| **LOOKING FOR INFORMATION** | | | | |
| Identify which books/journals/ websites to use | | | | |
| Select relevant parts of a text | | | | |
| Evaluate sources | | | | |
| **USING SOURCES** | | | | |
| Acknowledge sources of information | | | | |
| Synthesize information from more than one source | | | | |
| Write a bibliography correctly | | | | |
| Avoid plagiarism | | | | |
| **PLANNING/WRITING** | | | | |
| Brainstorm ideas | | | | |
| Plan written work | | | | |
| Organize your text | | | | |
| Link ideas effectively | | | | |
| Summarize ideas | | | | |
| Paraphrase ideas | | | | |
| Write an introduction | | | | |
| Write a conclusion | | | | |
| Critically edit written work | | | | |

* You may not require all the skills mentioned – there is some variation from department to department.

| SKILLS | Do not know about this | Find this difficult/ cannot do this | Can partially do this | Can do this well |
|---|---|---|---|---|
| **PERSONAL STUDY SKILLS** | | | | |
| Work independently | | | | |
| Manage time – meet deadlines | | | | |
| **ORAL EXPRESSION** | | | | |
| Give a presentation on my work | | | | |
| Discuss ideas for a project with other students | | | | |
| Discuss written work in a tutorial | | | | |
| **IT SKILLS** | | | | |
| Access the Internet | | | | |
| Use search engines | | | | |
| Create Word documents | | | | |
| Use PowerPoint | | | | |

**REMEMBER - A skill improves with practice!**

# APPENDIX 3: Taking notes

Why do you take notes? You may take notes in order to:

- record information;
- help you concentrate;
- use them as the basis of a summary;
- use them in essays;
- help you remember things;
- help you categorize the main points and supporting information.

Below are some characteristics of good notes.

- They are accurate – the information recorded is correct.
- They are clear – you can read them weeks later.
- They are easy to understand – even months later.
- They are organized (e.g., highlighted or underlined) – you can identify the main points at a glance.
- They can be used for your specific purpose – you have enough detail for an essay, if that is what you need to write.

## Task 1: Taking notes when listening or reading

**What is the difference between taking notes when listening to a lecture or when reading an article? Fill in the table below with more differences.**

| Listening | Reading |
|---|---|
| You only hear it once, cannot rewind. | You can read it again and again. |
| | |
| | |
| | |
| | |
| | |

## Task 2: Discussion

**What do you find most difficult about taking notes? Discuss with a partner and note your ideas in the table below.**

| When listening | When reading |
|---|---|
| | |
| | |
| | |

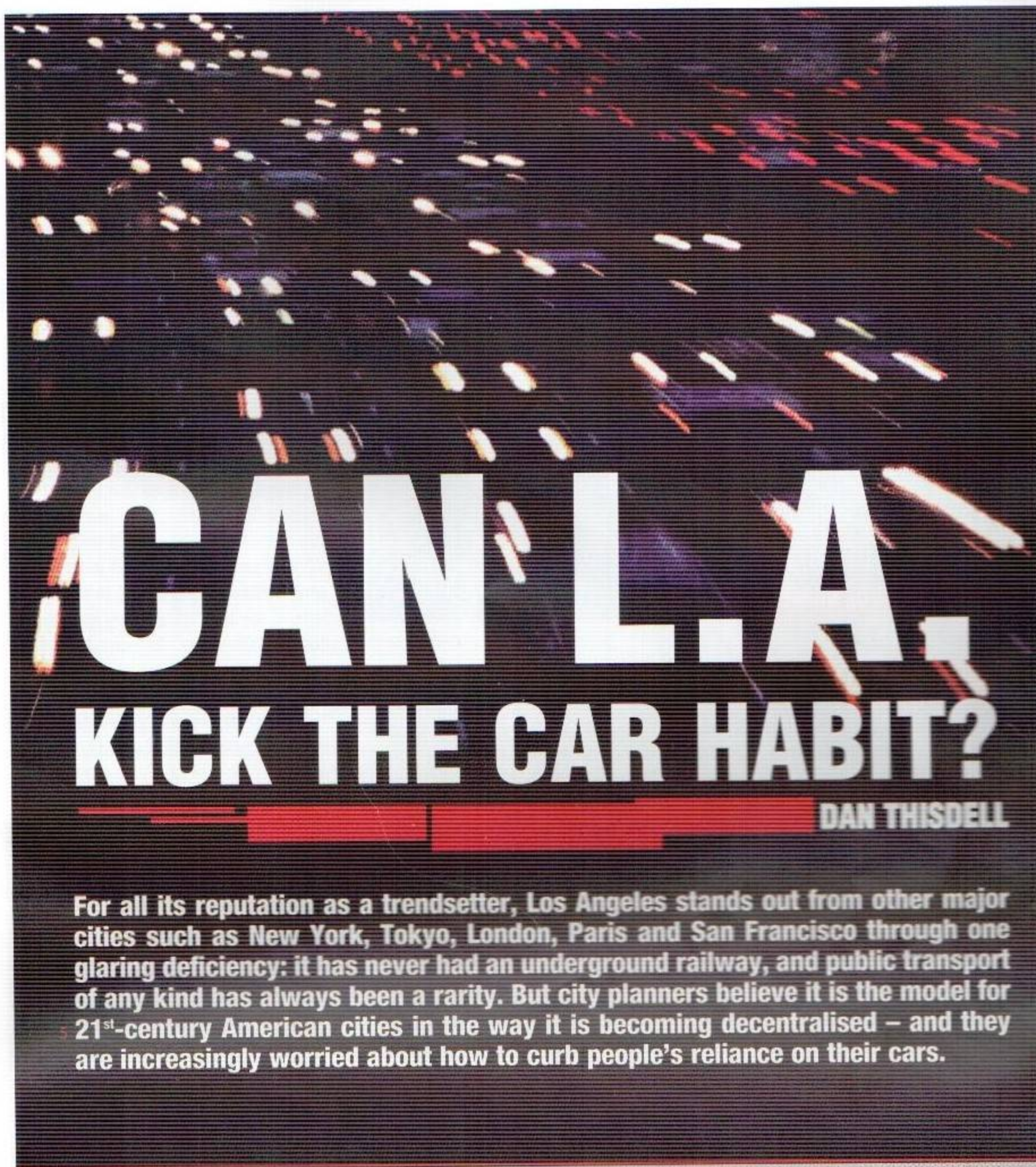
### Good strategies for taking notes

- Choose a note-taking style that suits you, e.g., mind-mapping or linear.
- Think about your purpose before you write – why are you taking these notes?
- Use your own words as much as possible – this means you must understand what you read or listen to.
- Sometimes, it is more appropriate to annotate photocopied sheets or handouts, or to use a highlighter pen or a pencil to underline key information. However, this makes it much more difficult to use your own words (or paraphrase the information) later.
- Be selective – only note down information that you think will be useful for your purpose, e.g., if you are looking for specific information to support a point in your project, you can ignore a lot of what is in the text.
- Give yourself plenty of space to write your notes, as you may want to add to them later.
- Use abbreviations. Make sure that you know what your abbreviations mean!
- When you have finished taking notes, look back and comment on what you have written. Write questions about the information/ideas, and write down any connections or links with other notes you may have made. Be proactive when making notes, as this will make them more meaningful.

## Task 3: Note-taking strategies

**Add any other note-taking strategies you know of below.**

## APPENDIX 4: Source 1



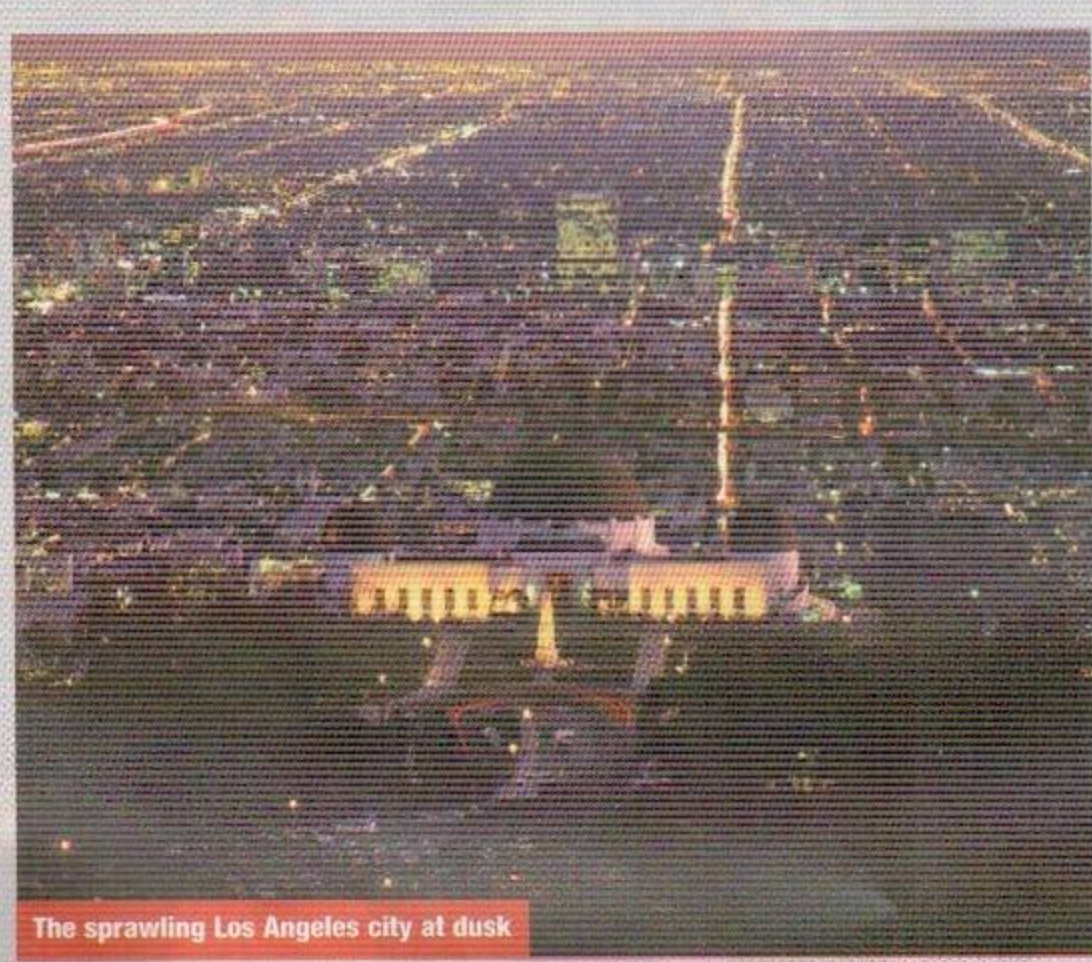
# CAN L.A. KICK THE CAR HABIT?

DAN THISDELL

**For all its reputation as a trendsetter, Los Angeles stands out from other major cities such as New York, Tokyo, London, Paris and San Francisco through one glaring deficiency: it has never had an underground railway, and public transport of any kind has always been a rarity. But city planners believe it is the model for 21st-century American cities in the way it is becoming decentralised – and they are increasingly worried about how to curb people's reliance on their cars.**

The first step was taken in 1993, when a 7-kilometre underground route with five stations opened from downtown Los Angeles to Hollywood. This Red Line was completed in 2000, and it is now 46 kilometres long, and is part of a 30-year effort to ease the region's chronic traffic congestion. The complete system, called Metro, will be an integrated network of underground and surface railways, shuttle buses and an improved freeway (motorway) system with new routes, high-technology aids to improve traffic flow, some toll roads, and "car pool" lanes reserved for vehicles carrying more than one person. Other elements of the Metro project include tow trucks patrolling freeways to clear crashed or broken-down vehicles, car parks at outlying rail stations, "dial-a-ride" services for the elderly and handicapped – and even expansion and improved maintenance of Los Angeles County's 800 kilometres of cycle ways.

The sea change of attitudes that Metro represents is hard to overstate. Los Angeles's physical appearance, size and society have been shaped during its rapid post-war growth by complete reliance on the private car. Railways have not figured in the transport equation until very recently. In 1990 the Blue Line, a 35-kilometre electrified rail service from Union Station to Long Beach, began running


The sprawling Los Angeles city at dusk

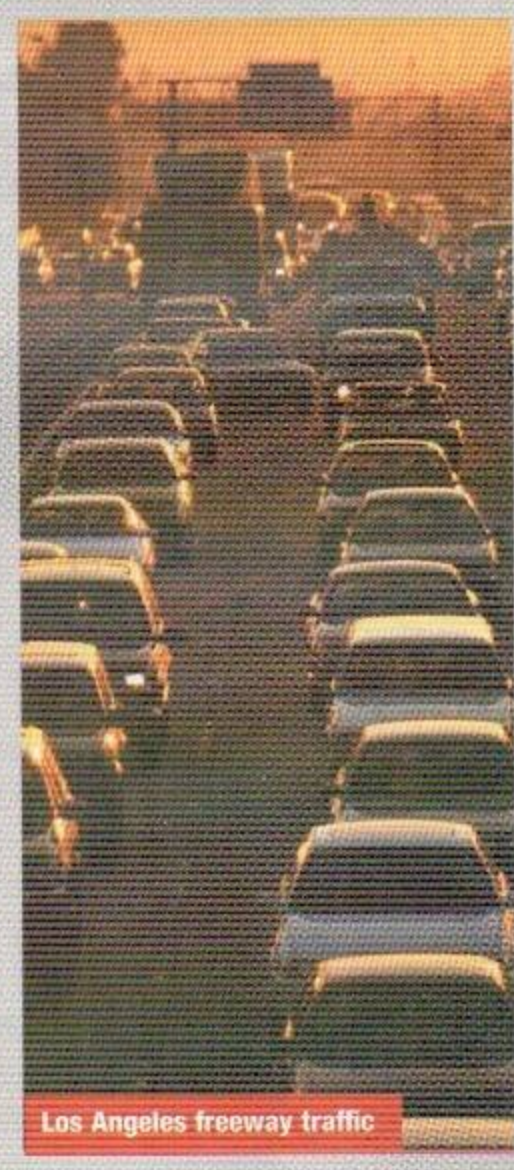
along the route on which a similar service ran until 1961. By late 1992, three commuter lines started operating on existing freight tracks into the same terminal, where the underground begins. In the intervening three decades, the only public transport in Los Angeles County has been a bus network. It runs 25,000 buses and carries 1.3 million passengers daily, but much more is needed in a county that spreads over 11,340 square kilometres.

The Metro project is an attempt to reduce congestion and draw back some of the lost time and productivity, cut pollution and dependence on imported oil, and eventually improve the quality of life. But such dreams don't come cheap. The first short stretch of underground alone cost $1.45 billion, or about $200 million per kilometre. The alternative, though, is grim, for the scale of the problem facing the area is enormous. James Ortner, the air quality transportation administrator for the Los Angeles County transportation committee, says it is clear that road building alone can no longer meet the area's transport needs. An enormous public transport system, together with some expansion of the region's 960-kilometre freeway network, is now seen as the only way to stop traffic congestion getting even worse. With the population projected to grow as the region's inhabitants and their jobs become more scattered, traditional forms of public transport will be effective only in limited areas.

## CAR CULTURE

The 8.8 million people living in the county of Los Angeles ten years ago owned six million motor vehicles. By 2010 the population is expected to exceed 10.2 million. But travel between counties in southern California is so significant that transport planning for Los Angeles County must also consider the surrounding counties such as Ventura and San Bernardino, an area of about 20,000 square kilometres. Its total population will probably climb to between 21 and 23 million by 2010 and the number of vehicle journeys each day will top 60 million – up from 45 million in 1990.

The population and physical area are combined with demographic trends and land-use patterns which make transport planning difficult. Unlike, say, London, which remains essentially a "mono-nuclear" region, with commuter travel patterns resembling a tidal flow to and from the centre each day, downtown Los Angeles is just the most significant of many centres in southern California. Despite being the focal point of Metro, the downtown area's dominance is expected to diminish in coming decades. Settlements around Los Angeles have always been widely dispersed; unlike European or American East Coast regions, they have never been tied to a dominant trading centre such as a port. Paradoxically, it was the railways which helped create this pattern. In the late 19th century railway companies were encouraged to open up the American west with offers of cheap government land. They built tracks and then sold on the surrounding land at a profit. This resulted in the early development of far-flung agricultural communities dispersed around Los Angeles (hence Orange County, where


Los Angeles freeway traffic

Can L.A. Kick the Car Habit?

A cloud of smog covers the city

orange growers predominated) and meant that the inhabitants of Los Angeles were second only to Detroit – hub of the American motor industry – in their haste to adopt the motor car early this century. The land-use patterns that make the private car so appealing to southern Californians have worked against the establishment of a public transport system. The idea of an underground railway was proposed seriously in 1925, but the county's voters rejected the idea. As Ortner points out, even then city dwellers in central Los Angeles who could have benefited from an underground were outnumbered by people from the rural communities, who were already dependent on road transport.

Planners think that the population will grow fastest in suburban districts. The percentage of total employment that is in downtown Los Angeles will fall, despite it being the one best served by public transport. There is a clear trend towards dispersal of both people and jobs to "edge cities" in the county, meaning the continued creation of new centres of commuter travel. This problem is not unique to Los Angeles. Other American cities such as Chicago, New York, and Houston are following a similar pattern. Ortner and his colleagues are therefore concerned to get the Metro programme working as effectively as possible so that the lessons can be applied more widely. However, the trend towards even greater dispersal can only make public transport more difficult to provide and less attractive to people with cars. Also, reducing congestion on the freeways encourages car use, meaning that the proportion of journeys made on public transport falls. In the past decade in San Francisco, public transport's share of the journeys made has fallen from 12 per cent to 8 per cent. The signs for Los Angeles are no more encouraging. "If we built every transit project on the books we would still only have about 11 per cent of commuter trips on [public] transit in 2010," says Ortner. And he reckons that even if by then everyone was making the maximum use of telecommuting – using telephone links to work from home – the figure would only grow to 13 per cent. Given the sums involved, the cost-benefit seems unsatisfactory. Ortner admits that political considerations could ultimately remove the resources needed to achieve even that much.

The difficulty highlights two problems. One is that, in Ortner's words, "the models which transportation planners have to work with are based on core-dominated urban regions of the 19th or early 20th century." But Los Angeles, and most cities in the western US, are multi-nuclear areas, and the traditional models do not work for them. "We're putting a round peg in a square hole," he says. There is an extra twist which is probably not even unique to Los Angeles: it is that commuting is not the biggest problem. Nonwork trips – whether for leisure or as diversions from a commuter journey (to drop children at school on the way to work, say, or to buy food on the way home) – at present account for a steady 80 per cent of all vehicle journeys. In southern California, the worst day for air pollution is not during the working week, but on Saturday, when commuter traffic is negligible.

## WRONG ROUTE

"For 30 years government money has been going on dealing with the commuter, and now we find that the nonwork trip is the biggest problem," says Ortner. "We don't know how to handle it." In short, the well-cultivated freedom of movement that comes with cheap cars and low-priced petrol makes public transport an "inferior good". "I don't know how you fight that," says Ortner. Los Angeles is thus a prisoner of its car-bound freeways; breaking free will entail changing life-styles. "The British should be forewarned," says Ortner. "If they want to stop the [traffic] onslaught, now is the time to do it." Restrictions on the use of the road network might never be politically acceptable, but some steps will be taken. Ortner points to the recent introduction of toll roads, a novelty in southern California, with "congestion pricing" which makes the roads more expensive at peak hours. More ambitious are plans to increase the data capacity of the region's telephone system with fibre-optic cable to make it easier for people to telecommute. "Our goal is to redirect 20 per cent of future trips to home or satellite work centres. It is too soon to tell whether or not that will work," says Ortner.

Toll roads may be a way of reducing the congestion

The underground appears to have gone down well with the public. During its first week 21,000 people travelled on it each day – three times the projected number – helped by a one-week "introductory" flat fare of 25 cents. The figure fell in subsequent weeks, but the combination of existing and planned surface rail connections to Union Station and a network of local shuttle bus routes raises the hope of reasonably efficient commuting to downtown Los Angeles.

As a construction project, the underground is a large and challenging undertaking. One construction manager at a station that has yet to open describes it as the biggest civil engineering project now running in America; another calls it the eighth engineering wonder of the world. The hardest part about digging in any built-up city is to do it without causing major disruption on the surface. The tunnelling itself is relatively easy: just as with the Channel Tunnel or Thames Water's ring main around London, "mole" machines did the burrowing, producing tunnels 6–7 metres in diameter and 21 metres below the surface. Unlike the London Underground's labyrinthine networks of tunnels, the Los Angeles stations are simple concrete boxes. Designed with security in mind, they are equipped with video surveillance and patrolled by armed guards. There are no nooks, crannies or corners. A spokesperson for London Underground describes the system – like those in Washington and San Francisco – as being "built like tubes; and the stations are just bigger tubes." The designers were able to keep things simple because they were working from scratch on a system that only involves one line. Yet despite the emphasis on security, the platforms, entrances and exits are obvious targets for the criminal activity that is rife: 13 different gangs operate in a central section of the city, and defend their turf with guns.

Besides the human threats, there are two natural hazards: gas and earthquakes. Underground, the potential for methane explosions is a serious danger. The tunnels run through what Richard Seal, a senior construction inspector, describes as "very gassy" ground, where commercial oil drilling continued into the early 1900s. During construction, checks are made every four hours for gas, and the completed tunnels are lined with plastic 10 centimetres thick to keep the gas out. Because of the earthquake threat from the San Andreas Fault, they are also lined with concrete. The underground in San Francisco, which uses similar techniques, resumed service almost immediately after the October 1989 tremor, which measured 6.9 on the Richter scale and had its epicentre only 100 kilometres away.

One thing that cannot be built into a system is a "subway culture" of passenger etiquette and safety awareness. So far though, all seems orderly underground. On the surface, however, the level crossings for the Blue Line have caused some trouble: since October eight motorists and pedestrians have been killed after ignoring barriers. Several of the deaths are thought to have been suicides, but other victims may have been people not used to frequent passenger trains travelling at up to 100 kilometres per hour on lines until recently used only for freight.

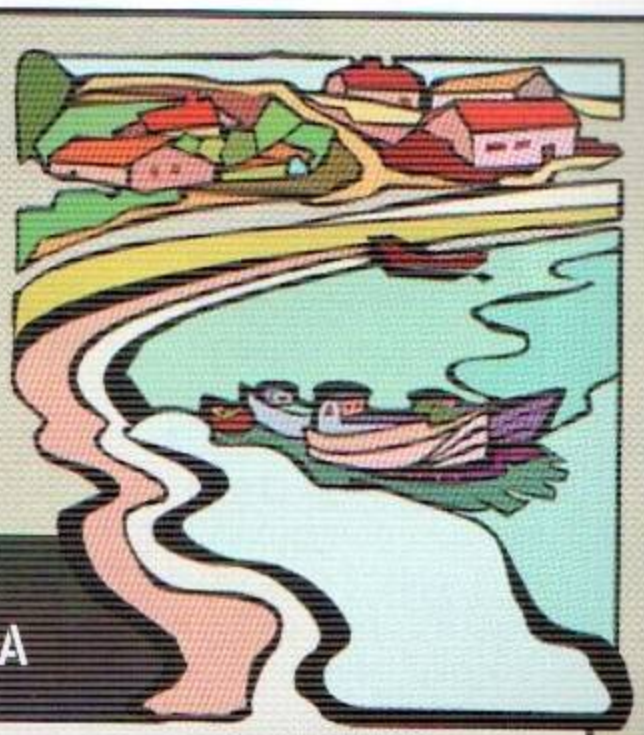
Long-term funding for the underground is secure. In 1980 Los Angeles voters approved a half-cent sales tax on petrol, which raises about $400 million annually, of which 35 per cent goes to railway building. Another half-cent petrol tax approved in 1990 should raise another $400 million each year, specifically for the Metro project and highway improvements. What remains to be seen is whether the local culture can alter sufficiently to make public transport work. Legislation might help – for example repealing the local regulation which requires car parking to be made available as part of any development project – but the fear of crime may be the greatest obstacle. Economic uncertainty, the riots, especially in the early 1990s and the general scale of violent crime have left Los Angeles on edge. And though the underground hardly passes through the most crime-ridden part of the city, it does visit areas which many would rather avoid.

The search for a solution to Los Angeles's transport problems may turn out to be 'wishful' thinking. There may simply be no hope of changing the behaviour patterns of most long-distance car commuters. Ortner remains convinced that the effort is worthwhile, but admits that the decision made during the 1950s to rely on freeways and private cars has created a pattern of land use which will dominate Los Angeles for decades to come – possibly forever. "We will carry on through the fog and try to make life better for people," he says. "They may or may not want to use it. But: we can offer an alternative which will help ... though it won't change land-use patterns all that much."

Source: Thisdell, D. (1993). Can L.A. kick the car habit? *New Scientist*, *140* (1877), 24–29.

## APPENDIX 4: Source 2

# SETTLEMENT CHANGES IN LEDCS



### CASE STUDY 1: URBANIZATION IN AFRICA

Towns and cities have existed in LEDCs for a long time. Since 1950, LEDC towns and cities have grown rapidly as people have moved from the countryside. Their populations have also increased until recently, because of high birth rates.

Urbanization in LEDCs is different from that found in MEDCs in the speed and scale of change. The three main differences are that population growth rates are higher, income levels are lower and the urban areas have weaker planning and administration to cope with the extra population.

The average percentage of the population in urban areas is 37 per cent but it does vary. In Latin America the figure is 66 per cent, whereas in China and SE Asia it is only 25 per cent. In Africa the figure increased from 25 per cent to 33.4 per cent between 1990 and 1995. Africa has the most rapid rate of urban growth of population.

LEDC governments often encourage urbanization, despite the problems caused, because, per person, they are three to four times more productive than rural areas. However, dealing with the problems of urban areas often causes governments to neglect their rural people.

Experts think that the urban population of Africa will have huge increases in the next few years. High fertility, fewer infant deaths and increasing life expectancy suggest the urban population could double by 2010. Cairo has already emerged as a mega-city with more than 12 million people in 1995, and Lagos is expected to soon.

### Problems in large cities in Africa:

- High unemployment and large informal sector.
- Poverty.
- Poor quality and overcrowded housing.
- Failing transport, water supply and sewage systems, e.g. in Accra only 35 per cent of houses are connected to a sewage system and only about 66 per cent of the solid waste produced by houses is collected. In Dar-es-Salaam 65 per cent is collected, in Kampala only 10 per cent.
- Water is often contaminated and there is too little of it, e.g. in Accra only 35 per cent of houses have indoor piping of water, 24 per cent use a stand pipe and 28 per cent buy from water vending carts. The remaining houses collect rainwater and use open waterways.
- Overcrowded education and health facilities.
- Rapid growth of a young population through migration from nearby smaller towns and increasing life expectancy.
- Destruction of any free land in the urban area, especially along water courses, and the felling of trees for firewood.
- Inadequate enforcement of the law especially on the environment and health.

### African cities with populations over 1 million

| Geographical location | 1970 | 1980 | Examples |
|---|---|---|---|
| North Africa | 4 | 8 | Cairo (12m) largest in Africa. Algiers, Alexandria, Casablanca, Khartoum, Rabat, Tripoli, Tunis |
| West Africa | 1 | 8 | Ibadan, Jos, Kedina, Lagos, Abidjan, Accra, Conakry, Dakar |
| East Africa | 0 | 6 | Addis Ababa, Nairobi, Dar-es-Salaam, Harare, Lusaka, Kampala |
| Central Africa | 1 | 6 | Kinshasa, Kananga, Luanda, Maputo, Yaounde, Douala |
| Southern Africa | 2 | 5 | Johannesburg, Cape Town, Durban, Pretoria, Port Elizabeth |

## CASE STUDY 2:
## WHY HAS MEXICO CITY GROWN?

It is estimated that Mexico City will have a population of nearly 20 million by the year 2000. Its population density is well over 10,000 people per sq km. Its population has been growing rapidly because of the arrival of large numbers of migrants from the countryside, high birth rates and falling death rates. It is estimated that 40 per cent of its population live in 'informal settlements' or 'shanty towns'.

However, Mexico City is not all poor houses. The city has a long history with many magnificent buildings as well as broad highways flanked by multi-storey corporate headquarters. There is an extensive metro system within the built-up area, an international airport and university.

One Internet site describes the city as 'crowded, polluted, and chaotic but also passionate, exotic and beautiful'.

### 1 Rural to urban migration

Factors that push people from the rural areas and factors that pull them to urban areas are listed below. About 1,000 new migrants arrive in Mexico City every day. Of course there are positive things about living in the countryside and negative ones in the urban areas. The 'bright lights' of the urban areas make them more attractive than they really are.

| Push factors | Pull Factors |
|---|---|
| Poverty | Richer people |
| Low pay | Better pay |
| Unemployment | More jobs |
| Few schools | Primary and secondary schools |
| Few doctors | Health care and hospitals |
| Poor roads | Cars |
| Poor electricity and water supply | Electricity and water |
| | Entertainment |

In LEDCs migrants often move first to a local town and then to Mexico City. This is called 'step-wise' migration. However, as birth rates remain high in rural areas and health care is improving, the population total in rural areas is not falling.

There are jobs in the cities – 65 per cent of Mexico's economic activity is in Mexico City. There are oil, chemical and food processing industries. In addition cement, glass, paper, clothing, electronics, household appliances and cars are made in the city. Most of the main banks have their head offices here. The people of the city have very varied ways of life. There are houses for the rich in elegant suburbs such as Pedregal as well as crowded squatter settlements, such as Netzahualcoyotl, which is located on the dry bed of Lake Texcoco.

### 2 High birth rates

When the migrants arrive in Mexico City, they find life hard with little or no employment available. All the family works to get money for food and to pay the rent for their tiny room in a shanty town. Many children miss school, have a low level of education and many girls are pregnant by their sixteenth birthday. Only 55 out of every 100 children attend primary school despite free education. Few know how to use contraception. Many of the people moving to the urban areas consist of younger age groups. As a result birth rates are high (24 1998).

### 3 Death rates are falling

In the past, poor water supplies, little sanitation, rubbish and sewage in open drains meant that death rates were high, and buses have made the air so polluted that to breathe is equivalent to smoking 25 cigarettes per day. The city planning authorities with the help of overseas aid, are improving health. They are investing in more doctors and hospitals; there are restrictions on car use; they use lead-free petrol; a metro train has been introduced, and self-help housing schemes have been introduced. These actions improve the quality of life for people and the death rate caused by pollution has dropped significantly (5 per 1000 in 1998).

There are signs that the growth rate of cities in LEDCs has improved mainly because, as women become more educated and they start to use contraceptive methods such as the birth pill, infant mortality has decreased. In addition, in Mexico, other cities have started to grow rapidly.

## PROBLEMS

### Housing

In Mexico City, as in other LEDCs, housing is seen as the highest priority. Unlike most cities in MEDCs the houses of the poor are mostly found on the edges of the city. These are often found in unplanned, illegal settlements called 'shanty towns'. Mexico City has become ringed by a series of shanty towns – 'villages' – often built illegally but on public open space or even on farmer's land. They are built from scrap materials and are usually one-roomed shacks. They lack the basic amenities of housing such as running water and sanitation. Some houses have electricity by connecting illegally to the main supply, which runs outside the town. No one knows how many people live in the shanty towns.

### Water, land and air pollution

Water pollution is a problem because rainwater is not kept separate from industrial and domestic users. This leads to the pollution of drainage channels. The high temperatures and heavy rainfall make this worse. In some cities sewage is still drained directly into rivers. Most shanty towns have no sewerage system and use pits dug in open spaces. On hillsides, such as those around Rio de Janeiro, the sewage may seep down into other people's drinking water supply. In Mexico City only about 75 per cent of the rubbish is collected by the refuse collection service. In some areas women collect human excrement to dump in refuse pits nearby. Illegal dumping of industrial waste and refuse from the 'informal sector' creates land pollution. Because Mexico City is sited in a basin surrounded by hills, the air pollution from four million cars and industry is not blown away. Car and bus fumes are a problem because of old inefficient engines and low-quality petrol.

### Subsidence

Parts of 'downtown' Mexico City are built on the soft deposits of an old lake. Some areas have fallen by 6m damaging buildings and breaking water and sewerage pipes. New buildings have to be erected using steel piles and concrete drums.

There have been suggestions that the conditions in some areas of Britain are nearly as poor as those found in LEDC cities. In areas such as South Yorkshire the unemployment level is over 15 per cent since the closure of steel works and coal mines. Earnings are low and the amount of derelict land is five times the national average. This is the area where the film " The Full Monty" was made.

## THE WAY FORWARD

### Discourage rural to urban migration

The key thing to do is to improve conditions in other areas so that people do not wish to migrate for the apparent advantages of the city. This can be done by providing employment in other areas as well as by improving their educational and social services. Better transport allows people to live out of the city even if they commute in each day. In Indonesia the authorities tried to ban migration by issuing people with identity cards and requiring permits to change residence.

### Build satellite New Towns to disperse population

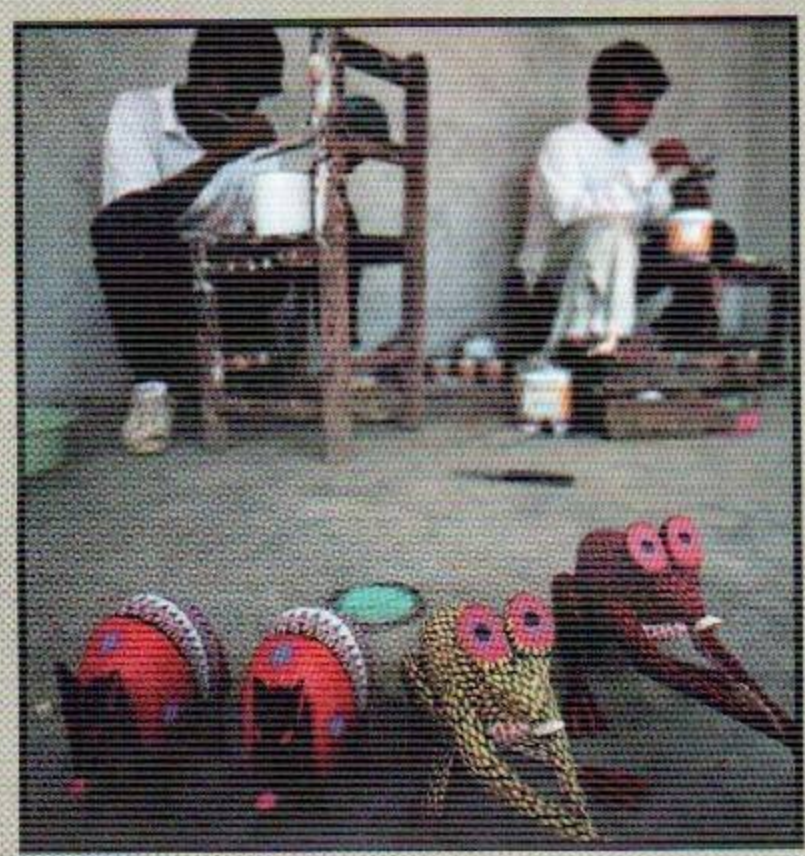
Hong Kong and Singapore have built high-density housing to reduce their problems of housing shortage. They could afford to build high-rise blocks of flats in new settlements outside the city. Kuala Lumpur used the same solution but built low-rise four-storey blocks. In all three cases the new residents were able to pay rents for their flats.

### Increase employment

Tourism is a key area for the growth of jobs. Tourists provide foreign currency that is vital to countries' development. They demand many services and this creates jobs. Many cities in LEDCs have features that attract tourists. City growth, increased traffic and neglect can threaten these attractions, for example the historic colonial core of Kuala Lumpur, the mangrove areas near Santos in Brazil, the beaches of Rio de Janeiro and the Taj Mahal in India. City authorities need to publicize the importance of conserving these important sites. A key feature of this strategy is to involve local business people, schools and residents.

The 'informal sector' is being recognized as one way to encourage employment. There are two main types of informal employment:

- Services such as shoeshine boys, street vendors, repairers, newspaper sellers, unofficial guides and food and drink sellers.
- Small-scale manufacturers of pottery, crafts, soaps, traditional ornaments, etc.



The informal sector supplies everyday goods at cheap prices as well as meeting the needs of some tourists. The traders are usually operating outside the law and without a license. In parts of India and Kenya the government has appreciated the role this group plays in growing trade and has given some protection to the people. The governments recognize that the informal sector employs large numbers of people though conditions and wages may be poor. Unfortunately the informal sector has a reputation for employing children and illegal immigrants.

The sector is very adaptable and ready to try to supply to most demands. Encouragement of this sector may lead to the growth of more stable industries and the money that changes hands fuels the economy of the city.

### Provide self-help housing

These are schemes where the local authority provides a concrete base and water supply to a small plot of land. The owner, often helped by neighbours, builds a house for the family. A second floor may be added as the town gets older. Gradually the self-built estates are upgraded as electricity is added.

### Elect stable government

In many cities in LEDCs, bureaucracy, corruption and unrest, including terrorism, have not helped to sustain the quality of life in the area. Foreign investors have to consider these problems when they consider where to locate their production plants. The low wages they would have to pay and the lack of trade union activity attract them but they fear disruptions to production and the safety of key workers.

### Improve transport

The government would like to encourage people to use public transport, but it has to have the finance to fund new buses and rail routes. Some successes have been achieved in Hong Kong, Singapore and Malaysia where wealthier governments had the funding.

### Obtain international aid to repair infrastructure

Education, especially for women and children including the street children and homeless adults as well as the mentally ill, would reduce population growth and provide better skills to help with employment.

### Introduce legal restrictions and fines to reduce pollution

The Mexico City authorities have joined with the national government and PEMEX (the national petroleum manufacturer) to agree an eight-point strategy costing 8 billion pounds. The eight points are as follows:

- checking car and bus exhaust fumes with restrictions on use until unleaded petrol used
- all new vehicles to be fitted with catalytic converters
- fines for companies found disposing of waste by illegal means
- monitoring of human solid and liquid waste disposal especially on beaches and public open spaces
- new cleaner technologies to be used in factories
- introduction of cleaner fuels
- education about environmental issues
- improved public transport.

### Involve citizens

Local authorities have formed Citizens' Councils to involve local people. Similar movements exist in the UK as well. Local people are able to suggest the best ways forward to meet their needs. Local authorities form Environmental Councils to:

- propose methods of preserving the local environment
- receive complaints about threats to open spaces and vegetation
- be a public voice influencing the City Council.

## SETTLEMENT CHANGE IN EUROPE

In the EU there is a core of areas with high population density stretching, nearly continuously, from central and south-east England through to southern Italy. This contains most of the largest urban areas in Europe.

Europe was the birthplace of manufacturing industry. The manufacturing areas of Europe developed with the help of their own cheap coal. As late as 1962 only Italy and the Netherlands in Europe used more oil than coal. By 1972 oil had become the main energy source. Founded on the coal-producing areas of the UK, France, Belgium, Luxembourg and Western Germany, a broad zone of industry developed. London's population reached 1 million by 1810 and 2 million in 1850. Paris reached 1 million by 1850 and Berlin, Vienna and Moscow by 1900. By 1994 some 68 metropolitan areas had developed in Europe. The large urban areas of Europe are London, Paris, Randstad (Holland), Rhine-Ruhr and Moscow.

### European urban problems

The successful growth of large urban areas also brings problems including:

- shortage of good quality housing, overcrowding and the creation of slums
- congested living in inner-city areas
- dangers of urban sprawl using up the countryside
- restless migrant populations
- long journey to work
- city transport system under strain
- widespread car ownership and traffic congestion
- need to renew central areas
- migration of people out of the tax area of the city they use.

### Deurbanization

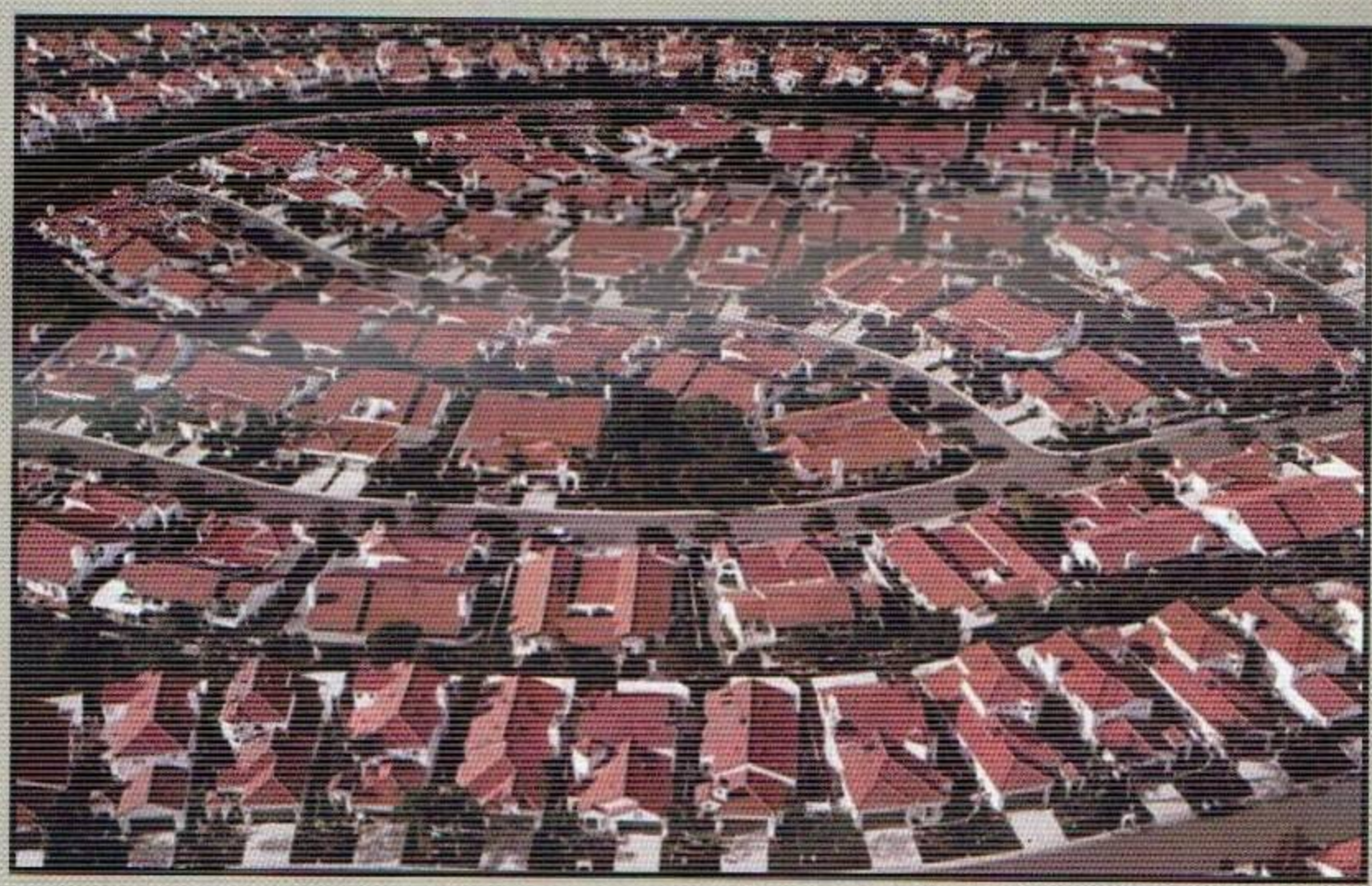
Since 1965, people have been leaving the urban areas of Europe to live in the semi-rural areas on the urban fringes. As a result the total populations of the large built-up areas have been falling. This has been made possible by improved transport which has made long-distance commuting, by better-paid people, a possibility.

There are many causes of deurbanization, including:

- increased life expectancy and longer retirements
- increased earned wealth of people retiring from urban employment
- decline of traditional heavy industry and textiles
- anti-urban feelings – viewed as crowded, congested, polluted, stressful as opposed to rural peace.

### Reurbanization

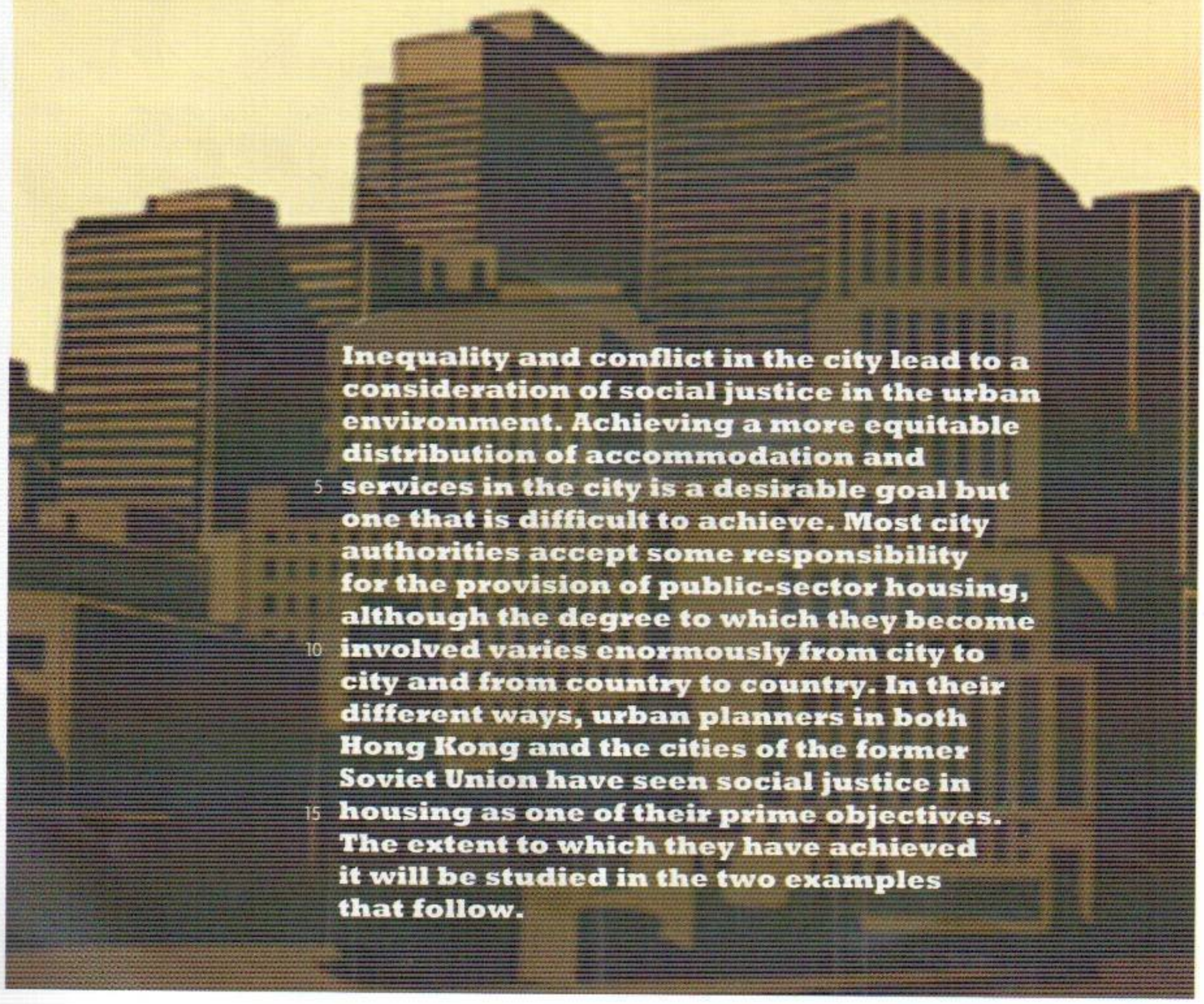
In the 1990s a number of governments have become concerned about the decline of their urban areas and plan to make them more attractive.



Source: Bilham-Boult, A., Blades, H., Hancock, J., Keeling, W. & Ridout, M. (1999). *People, places and themes*. Oxford: Heinemann.

## APPENDIX 4: Source 3

# SOCIAL JUSTICE IN THE CITY



**Inequality and conflict in the city lead to a consideration of social justice in the urban environment. Achieving a more equitable distribution of accommodation and services in the city is a desirable goal but one that is difficult to achieve. Most city authorities accept some responsibility for the provision of public-sector housing, although the degree to which they become involved varies enormously from city to city and from country to country. In their different ways, urban planners in both Hong Kong and the cities of the former Soviet Union have seen social justice in housing as one of their prime objectives. The extent to which they have achieved it will be studied in the two examples that follow.**

# CASE STUDY:

## Housing and the New Towns in Hong Kong

An extract from the Hong Kong Year Book, 1988, summarises the difficulties that exist in the provision of housing in the Colony and the New Territories.

> 'Despite the many modern buildings and other developments in Hong Kong, it cannot be denied that, as in any large city, there are run-down areas and other environmental black spots. This is not surprising, considering how rapidly Hong Kong's economy has grown. Some areas that were developed as recently as 30, or even 20 years ago were built to lower standards when the Territory was less affluent and have since deteriorated. In most of these run-down areas, there is severe overcrowding and a general lack of space for normal amenities.'

The population of Hong Kong was reduced to about 601,000 at the end of the Second World War in 1945, but by the end of 1947 an influx of people from mainland China had swollen the figure to 1.8 million. With the establishment of the Chinese People's Republic in 1949 further immigration from the north saw the population rising to some 2.2 million in 1950. This steady influx of refugees put intense pressure on housing. Squatter settlements began to appear around the edge of the urban area, on rooftops and in sheltered bays of the much indented coastline of the mainland and the island. The squatter communities still exist and are, to a large extent, tolerated by the government; special areas were created for some of the poorer families to build homes. Existing tenements saw a degree of subdivision which led to much overcrowding.

In 1953 a disastrous fire in a squatter settlement at Shek Kip Mei, Kowloon, left 53,000 people homeless and the government with no option but to house them. Shanties have remained, however and there is basically no systematic rehousing of squatters. They are only cleared when land is needed for redevelopment; land needed for future development is kept free of squatters and patrolled regularly. Squatters that are registered are rehoused; others are moved to temporary housing in which they can make their own improvements to what is essentially a bare shell.

Squatting has increased in junks and sampans in Hong Kong Harbour and in small creeks throughout the colony and the New Territories. The control of these boat squatters has proved to be a particularly difficult problem for the authorities. In recent years the arrival of refugees from Vietnam has exacerbated the problem. The long indented coastline of the colony and its islands makes total surveillance almost impossible. Squatters on boats regularly petition for public housing, but as soon as some areas are cleared, new arrivals appear and the problem returns.

The map (Figure 3.38) shows the principal squatter settlements that existed in 1955.

Figure 3.39 So Uk squatter village, Hong Kong

# Public Housing in Hong Kong

There are essentially three phases in the development of public housing in Hong Kong.

- **Phase 1** 1954–64. Initial rehousing of squatters from Shek Kip Mei (after the fire); acquisition of building land for redevelopment; big programme of high-rise public housing begins.
- **Phase 2** 1964–73. Big expansion in public housing programmes; estates mainly developed on the periphery of the urban area. Planning for the new towns begins.
- **Phase 3** 1974–present day. Reorganized housing authority has much wider powers; emphasis on the New Towns and the New Territories; first provision of government housing for middle-income families.

## The move to the new towns

As the government housing plans gathered impetus, it became apparent that available space in the Kowloon Peninsula and the north shore of Hong Kong Island was rapidly becoming exhausted. If the population was to be housed adequately, a radical solution had to be found. The only suitable land for future development was in the New Territories, beyond the central mountain barrier and around the eastern and western coasts. Population nuclei already existed and it was to these small rural and coastal centres that the authorities looked to fulfill the next stage of their programme. However, if population growth was to be stimulated in the new locations the problem of accessibility to the inner metropolitan areas would have to be solved. In the early stages of the development of the New Territories the majority of employment opportunities would still be on the Kowloon Peninsula and Hong Kong Island. The success of the creation of the new towns in the northern and central New Territories would be tied to the development of a fast and efficient transport system cutting through the central mountain complex. Such a service is provided by the fully electrified Kowloon-Canton Railway and the Mass Transit Railway (see Figure 4.47), which links Tsuen Wan into the metropolitan area and has three lines, 36.6 km of track and 37 stations, with

**Table 3.16 – New Towns in the New Territories**

| New town | Present population | Target population | Transport link |
|---|---|---|---|
| Tsuen Wan | 500,000 | 800,000 | Mass Transit Railway |
| Sha Tin | 300,000 | 750,000 | Kowloon-Canton Railway |
| Tuen Mun | 300,000 | 500,000 | LRTS and Hovercraft |
| Yuen Long | 110,000 | 180,000 | LRTS and Hovercraft |
| TaiPo | 150,000 | 290,000 | Kowloon-Canton Railway |
| Fan Ling | 110,000 | 220,000 | Kowloon-Canton Railway |

LRTS: Light Railway Transit System

interchange facilities at five. The present six New Towns are likely to be outpaced by the population growth in Hong Kong and the New Territories. The maximum size of the largest (Tsuen Wan) is 800,000, and it is not thought desirable to exceed this figure. Three New Towns are required for second-generation population growth.

125

**Table 3.17 – Five possible sites for New Town developments**

| Site | Physical geography | Existing settlements | Land use | Communications |
|---|---|---|---|---|
| Tin Shui Wai | Mudflats and low-lying surrounds: reclamation needed | Series of small villages involved in market gardening, fish culture and fish ponds | Mostly rice cultivation and market gardens. High environmental value of mudflats – wildlife much prized – nearby areas are protected | Nothing to prevent extension of Light Railway from Yuen Long and Tuen Mun. Rather isolated on north-west of New Territories |
| Ma On Shan | Low-lying floodable land on flanks of Tolo Harbour. Backed by high mountains rising to over 2,000 feet (702 m) | Small fishing settlements on Tolo Harbour | Mostly rice cultivation: some market gardens. Wildlife reserves; Ma On Shan Country Park | Main Kowloon-Canton railway on other side of Tolo Harbour. Possible link to Sha Tin New Town – road needs upgrading |
| Junk Bay | Deep inlet east of Kowloon. Flat land at north inland end: some reclamation possible | Two small fishing villages: Tseung Kwan O and Pennies Mill. Very close (2 km) to eastern suburbs of Kowloon | Mostly scrub-covered; some rice cultivation: wooded hills surrounding main inlet | Close to the suburban transport net of metropolitan Hong Kong. Possible extension of Mass Transit Railway |
| Nam Chung | Low-lying land around head. Starling Inlet – some reclamation will be needed. High wooded hills to north (Robin's Nest) | Small villages of Nam Chung, Wo Hang and Luk Keng | Mostly market gardening, fish ponds and duck ponds. Wooded hills surround | Good-quality road to Fan Ling on Kowloon-Canton Railway |
| Stanley Bay | Peninsula site: wooded hills to north, sloping down to Stanley Bay | Stanley Town – market centre and tourist attraction. Scattered settlements over hillsides: some shanty towns | Mostly wooded hills interspersed settlement, little cultivation | Tortuous route to north via Repulse Bay linked to main Aberdeen Road into Wan Chai and Causeway Bay |

**Source: Chaffey, J. (1994). The challenge of urbanisation. In M. Naish & S. Warn (Eds.), *Core geography* (pp. 138–148). London: Longman.**

## APPENDIX 4: Source 4

# SUSTAINABILITY

I have long wanted to complain to Bill Gates that my word processor's spell-checker does not recognise the word 'sustainability'. At first this surprised me, for the word has become indispensable in any discussion of human impacts on the environment. It is hardly one of those secret words only used by academics and other toilers in the depths of libraries, for it peppers the speeches of politicians, teachers, business leaders and environmentalists and, of course, geographers.

But perhaps Microsoft's dictionary-compilers are not so behindhand, for in fact sustainability has only recently become so widely used. The ideas for which it is so convenient (and, as we shall see, so slippery) a label have been around for many decades, but sustainability is very much a word of the 1990s. Specifically, it owes its global reach to the vast media roadshow surrounding the United Nations Conferences on Environment and Development (UNCED, or the 'Earth Summit') at Rio de Janeiro in Brazil in June 1992.

That event brought together 128 Heads of State and 178 governments and their attendant lobbyists, as well as a host of non-governmental organizations (Chatterjee and Finger, 1994). Sustainability was UNCED's 'Big Idea'. Thus launched upon the world, its meteoric rise to global buzzword began. But what does sustainability mean? Why did it emerge at Rio? What use is it? These questions are rather harder to answer than they look.

**W. M. Adams**

# WHAT IS SUSTAINABILITY?

What does sustainability mean? Irritatingly, we could answer, 'everything and nothing'. It is a word that promises much. A dictionary definition offers a range of meanings, each of which captures something of the meaning of sustainability. Longman's Dictionary of the English Language (1991) gives the following definitions of the verb 'to sustain':

- to give support or relief to;
- to supply with sustenance, nourish;
- to cause to continue, prolong;
- to support the weight of;
- to bear up under, to endure (to suffer, to undergo).

They are all to do with continuity ('prolonging', 'nourishing', 'supporting', 'enduring'). They are also all basically positive, all things that might be thought of as broadly desirable or admirable. In public debate about environment and development, use of the word sustainability suggests that change can be allowed to happen (or made to happen), that the best of what has been done before is maintained, whether that change is in an economy or society ('sustainable development') or in an ecosystem ('sustainable environmental management').

Internationally, the dominant definition of sustainable development has undoubtedly been that of the Brundtland Report, in *Our Common Future*: 'development that meets the needs of the present without compromising the ability of future generations to meet their own needs' (Brundtland, 1987, p. 43). This definition is both rhetorical and vague (Lélé, 1991), but it proved compelling as a way of pulling together concerns about environmental degradation and present and future poverty (often spoken of as inter- and intra-generational equity).

The word sustainability first appeared in British legislation in 1991, in the Act establishing the conservation organization Scottish Natural Heritage (SNH). SNH was charged with achieving and promoting the conservation and enjoyment of landscapes and wildlife 'in a manner that is sustainable'. This apparent coup for environmental thinking caused some scratching of heads in the new agency, because while the word might have sounded wonderful in Parliament, its meaning was far from clear. Eventually, SNH suggested that sustainability should mean 'the ability of an activity or development to continue in the long term without undermining that part of the environment which sustains it' (SNH, 1993). While heart-warming (and arguably very wise) as a general principle, this is hardly a sharply focused definition. When other UK national conservation agencies set up in 1991 got in on the act, their own definitions were no more specific. Their definitions of sustainability and sustainable development were:

- The ability of an activity or development to continue in the long term without undermining that part of the environment which sustains it (Scottish Natural Heritage, 1993).
- Sustainable development seeks to improve the quality of human life without undermining the quality of our natural environment (English Nature, 1993).
- Sustainability implies that human use of or enjoyment of the world's natural and cultural resources should not, in overall terms, diminish or destroy them (Countryside Commission, 1993).

## Summary

Sustainability is an emotive word, with complex meanings.

The concept of sustainability began to be used internationally in the 1980s (notably in the report of the Brundtland Commission in 1987), and first appeared in British law in 1993.

# SUSTAINABILITY: MORE THAN A BUZZWORD?

The Council for the Protection of Rural England describe sustainable development as 'the latest buzz-phrase to hit the planning profession' (Jacobs, 1993, p.8); indeed, it has become almost impossible to avoid using it. Geography has certainly not been free of its influence, as a glance round any mainstream publisher's catalogue, or a swift perusal of geography textbooks (including this one, of course!) would prove. Sustainability is therefore quite obviously important, if one measures something's importance by the number of people talking about it. What is less clear, however, is whether anything much lies behind the glittery promise of the word.

Figure 13.1 Ken Saro-Wiwa, Nigerian Ogoniland protester and playwright, killed by the Nigerian State in 1996 following protests about environmental pollution and the oil industry in the Niger Delta (much of it led by Shell International).

Superficially, the concept of sustainability seems very simple, yet it can have a wide range of meanings attached to it. Rio Tinto Zinc, or Shell, might speak of sustainability in the context of mineral extraction, but mean something very different to a Friends of the Earth campaigner or someone from Nigerian Ogoniland (see Fig 13.1); the Chancellor of the Exchequer might speak (indeed, has spoken) of 'sustainable' national economic management, and mean something very different to a proponent of a zero-growth economy (see Box).

Both environmentalists and conventional economic and political planners use the word sustainability to express their own vision of how economy and environment should be managed. The word does not end the debate about how society should exploit non-human nature, it simply re-labels it. Indeed, such is the power of sustainability to allow different ideas to be smuggled forward in its ample conceptual folds that it effectively delays debate and pushes it underground. Radical opponents of roads and other infrastructure have literally taken to the ground (or the trees) in opposition (see Figure 13.2). Their concerns have not been met by the growing debate about sustainability and transport in the UK. For a single

## Michael Jacobs on sustainable development

Governments often speak of aiming for 'sustainable growth'; they mean economic growth without inflation rather than without environmental degradation, and the usual interpretation of 'sustainable' is lasting about four years, or until the next election, whichever is the sooner.

(Jacobs, 1993, p. 9)

It needs to be remembered after all that sustainable development and sustainability were not originally intended as 'economic' terms. They were, and remain, essentially ethico-political objectives, more like 'social justice' and 'democracy' than 'economic growth'. And as such, their purpose or 'use' is mainly to express key ideas about how society – including the economy – should be governed.

(Jacobs, 1995, p. 65)

Figure 13.2 Swampy protesting over Manchester Airport, 1997

neat word, sustainability hides a theoretical maze of great complexity (Daly, 1990; Lélé, 1991). It offers a verbal flourish, but at its core is a theoretical black hole (Redclift, 1984, 1987).

Of course, it is not strictly fair to say that sustainability has no theoretical core. Its intellectual roots lie in population biology, ecology and economics. Through the 1920s and 1930s, biologists were developing simple mathematical models of population growth and competition, from which, in time, grew the notion of maximum sustainable yield, that populations of organisms (initially fish, but the point was generally true) could be harvested at a rate that allowed the population to reproduce itself.

These scientific ideas about how animal populations fluctuated, and what happens when people start to harvest them, comprise one stream of biological ideas feeding into sustainability. A second is in ecology, particularly in the concept of the ecosystem (proposed in the 1930s), and in ideas about plant succession. As ecology became influenced by systems thinking in the 1960s, ideas of equilibrium in ecosystems provided a further natural science basis for ideas of sustainability. The science of ecology seemed to show the vulnerability of the environment to human impacts, and the need for those impacts to be moderated. Meanwhile, from economics came concepts of renewable (flow) and non-renewable (stock) resources. These are diverse enough roots, but onto them many other ideas were grafted from the emerging world view of environmentalism, particularly about population growth, resource exhaustion and the toxic and shocking effects of industrialization and urbanization (Adams, 1990).

## Summary

Sustainability tends to be defined in different ways by different interests, for example, by environmental organizations and big business.

The concept of sustainability draws on specific studies of the dynamics of animal populations and ecosystem equilibrium, and ideas about the economics of renewable resource exploitation.

# SUSTAINABILITY AND THIRD WORLD DEVELOPMENT

The concept of sustainability first emerged at the United Nations Conference on the Human Environment, held at Stockholm in 1972 (Adams, 1990; McCormick, 1992). This meeting was the direct forerunner of the Rio Conference 20 years later. Like Rio, it saw profound divisions between industrialized countries and the Third World. The poorer non-aligned countries saw the First World's concerns about pollution and technology as the worries of an exclusive club of wealthy countries, and a potential threat to their ability to industrialize effectively. They also feared and resented the obsession of environmentalists in the First World with population growth (see Box page 118). The concept of sustainable development was coined explicitly to argue that an option existed that would allow appropriate (i.e., rapid) economic growth and industrialization without environmental damage. This happy outcome has been the target of all subsequent calls for sustainability.

Since Stockholm, different interests have emphasized different aspects of sustainability, and sought to claim the concept for their own. In 1980 the World Conservation Strategy (IUCN, 1980) took a strongly conservation-oriented position. It defined conservation as sustained resource use, and suggested three objectives for global conservation. The objectives of the World Conservation Strategy are:

- to maintain essential ecological processes and life support systems (such as soil regeneration and protection, the recycling of nutrients, and the cleansing of waters);
- to preserve genetic diversity (the range of genetic material found in the world's organisms);
- to ensure the sustainable utilization of species and ecosystems (notably fish and other wildlife, forests and grazing lands).

Six years later, the report of the World Commission on Environment and Development, *Our Common Future* (called the Brundtland Report after its Chair), had a very different emphasis. It deliberately broadened the debate, locating environmental issues within the economic and political context of international development debates. It therefore linked basic development needs and environmental degradation, arguing that one could not be solved without the other. The way forward, it suggested, was through global multilateral co-operation between rich and poor countries to achieve development sustainability achieved through careful economic growth.

The Brundtland Report, published in 1986, led directly to UNCED, in two ways. First, it was debate of the report in the General Assembly of the UN that led to the resolution to hold what became the Rio Conference. Second, it was this message of adapted or 'green' growth that provided the carrot to persuade both rich and poor countries to come to the negotiating table. None the less, the task of finding common ground was Herculean, and lasted through a full five years of preparatory meetings before the conference itself (Chatterjee & Finger, 1994). The documents produced by this 'Rio process' were the fruit of wearying debate far into the night by government delegations determined to produce a form of words that gave least away in terms of their own national interests.

Inevitably, divisions opened up over the distinction between countries in the industrialized 'North' and the underdeveloped 'South'. They disagreed over what the main global problems were (global atmospheric change, biodiversity loss and tropical deforestation in the industrialized countries, poverty and the environmental problems associated with it in unindustrialized countries), and they disagreed over who should pay for any action needed. Third World countries feared that their development would be stifled by restrictive international agreements on atmospheric emissions (just as at Stockholm in 1972), and they were jealous of their right to use the natural resources within their boundaries for development (notably tropical forests) without restriction by environmentalists in the First World (whose environmental concerns, arguably,

were only possible because of wealth itself created by polluting freely and consuming forests and other resources).

Eventually, some kind of agreement was patched together, and the conference agreed a slightly rambling set of 29 principles in the 'Rio Declaration', a much watered-down set of principles for forest management (unexcitingly titled a 'Non Legally Binding Authoritative Statement of Principles for a Global Consensus on the Management, Conservation and Sustainable Development of all Types of Forests'), and the vast compendium of good intentions in Agenda 21. Samuel Johnson, the essayist and first compiler of an English dictionary, is said to have apologized for the length of a letter, saying 'I did not have time to make it short'. So it was with Agenda 21, which contains more than 600 pages of text in 40 separate chapters. These were divided into four sections, covering socio-economic and environmental aspects of sustainable development, the actors who could make it happen, and the means of implementation (see Box page 119).

Agenda 21 has become an icon of sustainable development worshipped but not much read. Because of the way it was written through negotiation, every commitment has a get-out clause somewhere nearby. It contains therefore within it most possible arguments, and is readily mined for nuggets of text that can be used to legitimatize any given point of view.

However, the Rio Conference was a watershed. From then on, governments and international agencies began to re-interpret their normal work of economic planning within the new, internationally agreed, terminology. There was a substantial shift in political and bureaucratic rhetoric, but the new language sometimes lay wafer-thin across old and not obviously 'sustainable' policies. A shift in the language of policy of this magnitude, of course, is no small matter. It was due to two related forces. First, it was a straightforward response by politicians (particularly in Europe and North America) to the surge of environmentalism that took place

## Population, environment and sustainability

In the 1970s, first World environmentalists laid particular emphasis on the problem of population growth, arguing that as populations rose resource exploitation would inevitably become unsustainable. This argument was particularly made about rural populations in the Third World. Books like *The Population Bomb* by Paul Ehrlich (1972), and papers like Garret Hardin's 'The tragedy of the commons' (published in *Science* in 1968), started a new and apocalyptic 'neo-Malthusian' debate about people and environment. Through the 1970s and 1980s, the drylands of Sub-Saharan Africa were singled out in particular as a place where rapid population growth was leading to environmental degradation. Drought and famine were both significant problems in this decade, but attention focused in particular on the problem of 'desertification' and human-made deserts. It was widely held (not least by geographers) that population growth inevitably led to desertification, as farmers and pastoralists pushed semi-arid ecosystems past some natural limit.

However, research in recent years has begun to show that in several parts of Africa agricultural systems appear to have coped with significant levels of population growth without loss of sustainability. The most important study of this kind was conducted in the Machakos District in Kenya (M. Tiffen, M. Mortimore & F. Gichuki, 1994). In the 1930s, government officials despaired of Machakos, which was thought to be on the verge of ecological collapse due to over-population. Fifty years later, the changes have been remarkable. The population has soared (from 0.24m in 1930 to 1.4m in 1990), but far from destroying the environment, farmers have developed it. Terracing is extensive, cattle are stall-fed and their manure applied to the land (see Figs 13.4 and 13.5), and with the advent of cash crops (particularly coffee), the volume and value of output have increased to match population growth. It is an astonishing story, and while the experience of this area might not be a good model for the whole of Africa (among other things, the international city of Nairobi is not far from the borders of Machakos, and the main road to the coast passes through it), it is clearly unwise to make the automatic assumption that rural population growth is unsustainable.

## The contents of Agenda 21

**Section 1**
**Social and Economic Dimensions:** Eight chapters, covering international co-operation, combating poverty, consumption patterns, population, health settlements and integrated environment and development decision-making.

**Section 2**
**Conservation and Management of Resources for Development:** Fourteen chapters on the environment. These covered the atmosphere, oceans, freshwaters and water resources, land resource management, deforestation, desertification, mountain environments, sustainable agriculture and rural development. They also covered the conservation of biological diversity and biotechnology, toxic, hazardous, solid and radioactive wastes.

**Section 3**
**Strengthening the Role of Major Groups:** Ten chapters discussing the role of women, young people and indigenous people in sustainable development; the role of non-governmental organizations, local authorities, trade unions, business and scientists and farmers.

**Section 4**
**Means of Implementation:** Eight chapters, exploring how to pay for sustainable development, the need to transfer environmentally sound technology and science; the role of education, international capacity-building; international legal instruments and information flow.

(Robinson, 1993)

within Western societies in the early 1990s. Behind that pragmatic (perhaps sometimes cynical) politics lay a perception of environmental limits, which had itself driven that rise of environmental concern. As Bill McKibben wrote in his best-selling book *The End of Nature*, 'The greenhouse effect is the first environmental problem we can't escape by moving to the woods' (McKibben, 1990, p.188). Sustainability and sustainable development were the words people in the 1990s came to use to express that thought, and on which they tried to build arguments for reform.

**Figure 13.3** Smoke plume from UK power station: concern about acid rain was one of the environmental problems that led to the Stockholm Conference

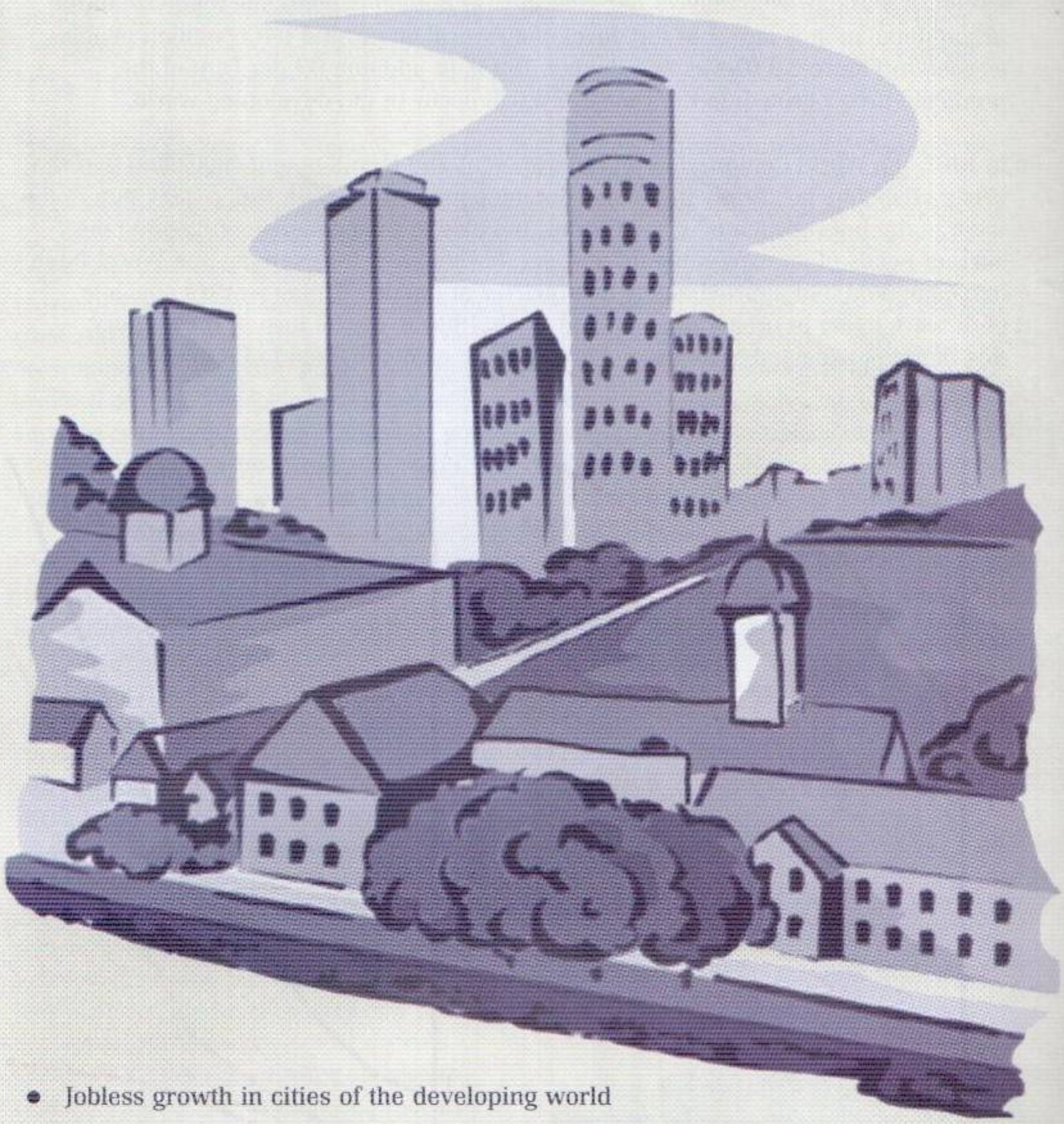
**Figure 13.4** Terraced farmland in Mexico

**Figure 13.5** Shell-fish cows, Mexico

Source: Adams, W.M. (1999). Sustainability. In P. Cloke, P. Crang & M. Goodwin (Eds.), *Introducing human geographies* (pp. 125–130). London: Arnold.

## APPENDIX 4: Source 5

# SUSTAINABLE URBAN LIVELIHOODS



- Jobless growth in cities of the developing world
- The nature of the Brown Agenda
- Ecological footprints and the regional impacts of cities
- The capacity and effectiveness of city authorities as core conditions for sustainable urban development
- Enabling social organization at the local level

# Introduction

The proportion of people living in urban areas of the globe is increasing, and particularly in the developing world. Whilst in 1800, only 3 per cent of the total world population lived in towns and cities, it is estimated that by the year 2000, this figure will have risen to over 50 per cent (United Nations, 1989). Although a greater proportion of the population of the developed world currently live in cities, as seen in Figure 5.1 (approximately 73 per cent or 900 million people), the total size of the urban population is larger in the developing world, at around 1,400 million people, as seen in Figure 5.2 (Devas and Rakodi, 1993). In addition 93 per cent of the predicted urban growth to the year 2020 will occur in the developing world.

In 1987, the World Commission on Environment and Development suggested that the urban challenge lay 'firmly in the developing countries' (WCED, 198, p.237), due in the main to the unprecedented growth rates, but also to the challenge of meeting the current needs of an expanding urban poor. In that year, for example, the World Bank had estimated that approximately one-quarter of the developing world's absolute poor were living in urban areas (World Bank, 1990a). By the turn of the century, this figure is expected to be nearer 50 per cent, as highlighted in Chapter 2.

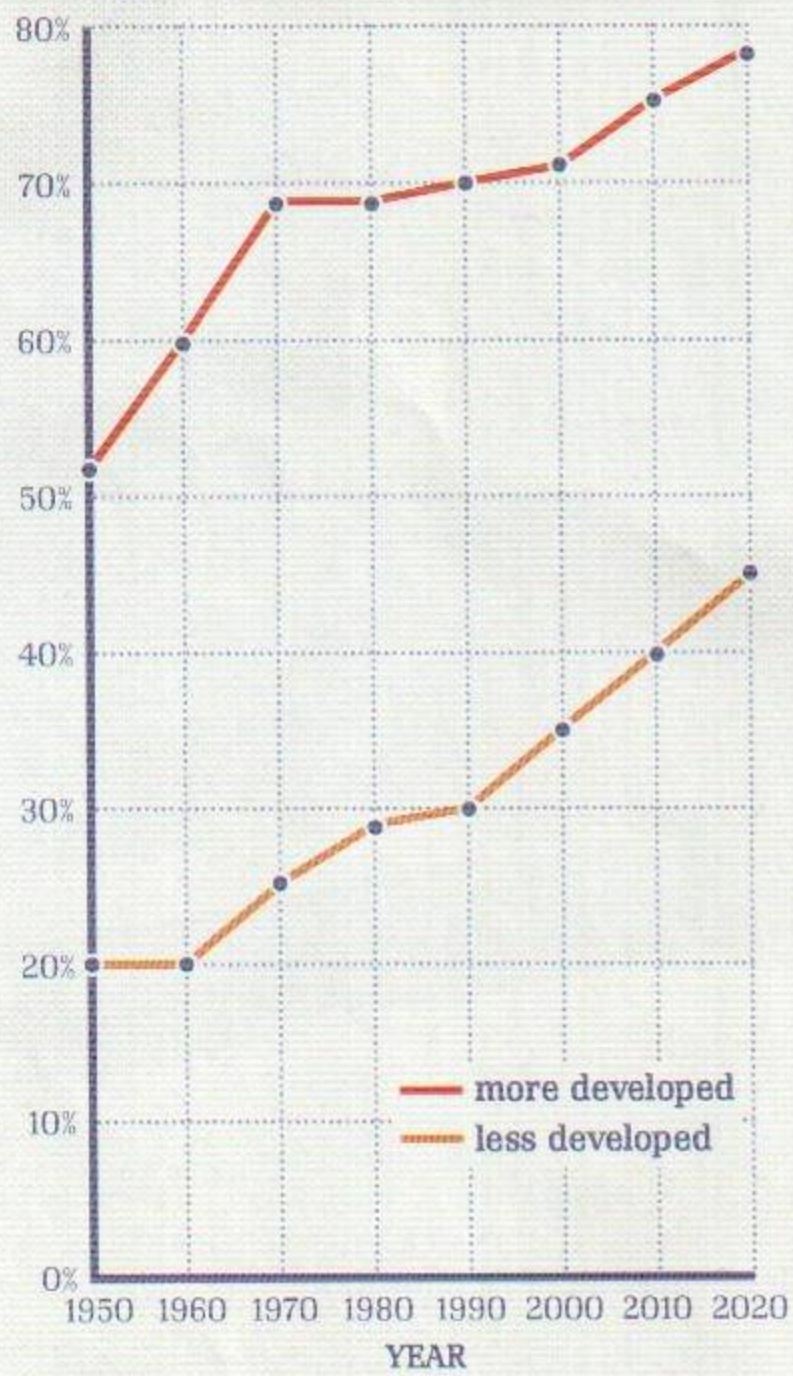



**Figure 5.1** *The proportion of the population expected to be living in urban areas.* Source: UN (1989)

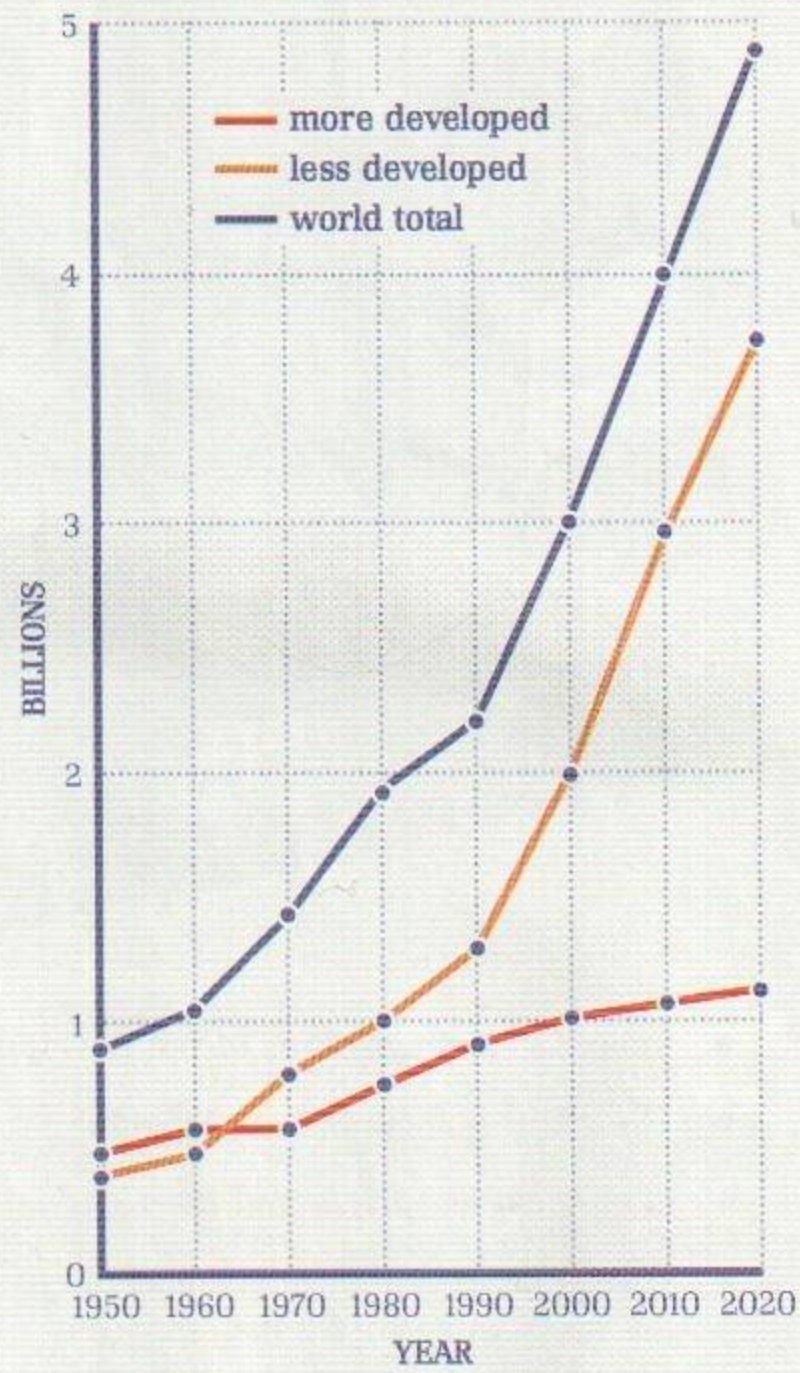



**Figure 5.2** *Projected population living in urban areas.* Source: UN (1989)

Cities are central to attempts at meeting the goals of sustainable development in the sense that this is where the majority of the world's population will soon be located, with all the associated physical demands (such as for food and shelter) and the political, social and cultural requirements associated with the adoption of urban values. In addition, city-based production currently accounts for the majority of resource consumption and waste generation world-wide (WRI, 1996). Throughout history, cities have been a driving force in development processes and, as cities grow, productive activities tend to concentrate in urban centres. For example, an estimated 80 per cent of GDP growth in the developing world in the 1990s originates in cities and towns (Bartone *et al.*, 1994). Wealthier cities, and higher income groups within urban areas, consume the highest levels of resources and contribute disproportionately to waste generation (WRI, 1996).

There are substantial challenges for *all* cities in managing the environmental implications of economic growth, in meeting the needs of their residents and for protecting the environmental resources on which they depend into the future. The focus of this chapter is the particular challenges of cities in the developing world, where it will be seen that the unprecedented rates of urban growth and industrialisation in combination with poverty create distinct and immediate environmental problems which to a large extent are not key concerns in wealthier cities. Figure 5.3 depicts a general characterisation of how environmental problems and the severity of their impacts differ within cities at various levels of income. The 'pollution' of urban poverty that arises from inadequate water supplies, sanitation, drainage and solid waste collection is seen to be the most immediate problem of cities in the developing world. These issues have been termed the 'Brown Agenda'. In wealthier cities, the key challenges for action lie in reducing excessive consumption of natural resources and the burden of wastes on the global environment (WRI, 1996). This 'Green Agenda', encompassing the depletion of water and forest resources, for example, has tended to receive greater international attention, because of the relation to issues of global environmental change such as climate warming.

However, such typologies or distinctions should not distort the common, global challenges of sustainable urban development. Whilst the Brown Agenda is the priority for low-income countries, actions are also needed in the cities of the developing world to promote the efficient use of resources and the minimisation of waste, if they are to prosper in future without the ecological impact of past developments as currently evidenced in 'first world' cities. In addition, as emphasised throughout earlier chapters, processes of globalisation are producing a far more integrated and interdependent world economy into the 1990s. Cities across the globe are experiencing change, not solely in terms of their size, but also in respect of the activities they host and the function they play in the world's economic, trading and political systems (Hamnett, 1995). This chapter details the primary characteristics of these processes of change and patterns of urban development in the developing world in order to understand more fully the specific nature of the challenges and opportunities of sustainable development in this sector.

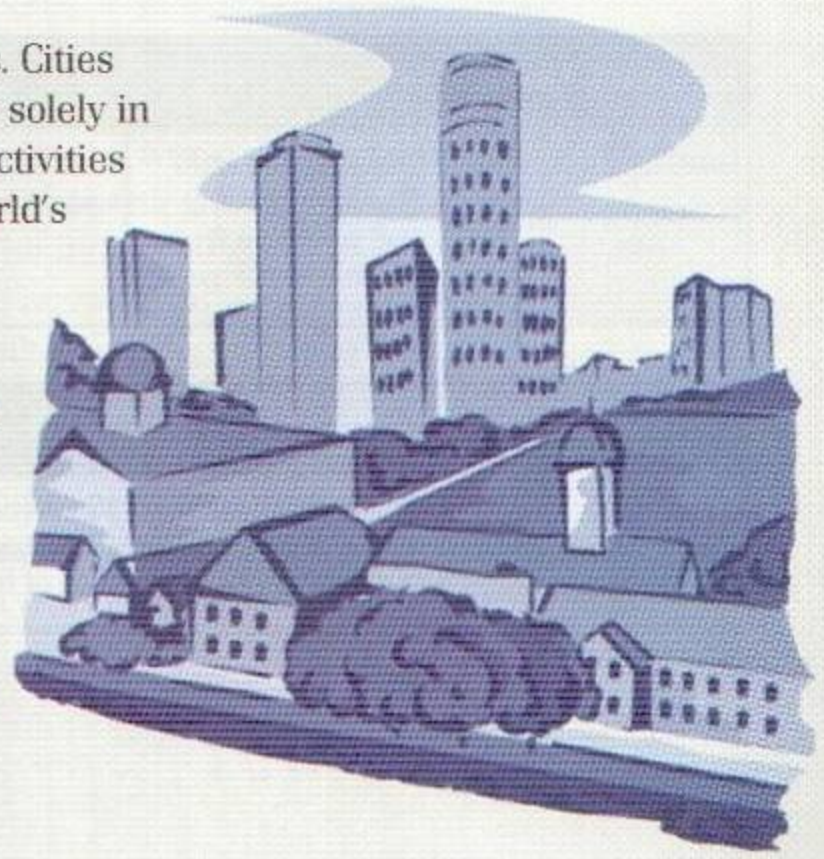


Figure 5.3 *Economic-environmental typology of cities*

| Urban environmental problems | Lower-income countries (<$650/cap) | Lower- to middle-income countries ($660 – 2,500/cap) | Upper- to middle-income countries ($2,500 – 6,500/cap) | Upper-income countries (>$6,500/cap) |
|---|---|---|---|---|
| ***ACCESS TO BASIC SERVICES*** | | | | |
| Water supply and sanitation | Low coverage and poor quality, especially for urban poor | Low access for urban poor | Generally acceptable water supply, reasonable sewerage | Good; concern with trace substances |
| Drainage | Low coverage: frequent flooding | Inadequate; frequent flooding | Reasonable | Good |
| Solid waste collection | Low coverage: especially for urban poor | Inadequate | Reasonable | Good |
| ***POLLUTION*** | | | | |
| Water pollution | Problems from inadequate sanitation and raw domestic sewage | Severe problems from untreated municipal discharges | Severe problems from poorly treated municipal and industrial discharges | High levels of treatment; concern with amenity values and toxic substances |
| Air pollution | Severe problems in some cities using soft coal; indoor exposure for poor | Severe problems in many cities from soft coal use and/or vehicle emissions | Severe problems in many cities from soft coal use and/or vehicle emissions | Problems in some cities from vehicle emissions; health priority |
| Solid waste disposal | Open dumping, mixed wastes | Mostly uncontrolled landfills, mixed wastes | Semi-controlled landfills | Controlled landfills, incineration, resource recovery |
| Hazardous waste management | Non-existent capacity | Severe problems, little capacity | Severe problems, growing capacity | Moving from remediation to prevention |
| ***RESOURCE LOSSES*** | | | | |
| Land management | Uncontrolled land development and use; pressure from squatter settlements | Ineffective land use controls | Some environmental zoning practised | Environmental zoning commonplace |
| ***ENVIRONMENTAL HAZARDS*** | | | | |
| Natural and man-made hazards | Recurrent disasters with severe damage and loss of life | Recurrent disasters with damage and loss of life | High risk from industrial disasters | Good emergency response capacity |

Source: Bartone et al. (1994)

# Urban change in the developing world

## Patterns

Whilst the general trend across the developing world, as seen in Figures 5.1 and 5.2, is for increasing levels of urbanisation, there are significant differences between regions and countries in the patterns of change. For example, it can be seen in Table 5.1 that the highest growth rates to date have been in Africa which is also where the most rapid change in the near future is predicted to occur. However, it is in South and South-East Asia that the largest numbers of people currently reside in urban areas and where the greatest future expansion in terms of additional urban residents will occur. Countries such as India have very large urban (as well as total) populations, for example. Indian cities such as Calcutta and Bombay are amongst the largest centres in Asia (as seen in Figure 5.4) and indeed the world (see Figure 5.5). It should be noted, however, that for some of the largest cities in the developing world, growth rates during the 1980s were significantly slower than during the 1960s and 1970s (UNCHS, 1996).

In many developing countries, a high proportion of the urban population is concentrated in one or two major cities. This pattern is more established in the countries of Latin America than in any other developing region (Hardoy & Satterthwaite, 1989). By 1985, for example, Mexico City, São Paulo, Buenos Aires, and Rio de Janeiro all had populations in excess of 10 million. In contrast, there were no cities of this size in the whole African continent by this date (although Cairo came close). In short, Africa's contemporary rapid urban growth rates are occurring over a relatively small base and are more widely distributed across many smaller and intermediate urban centres. Indeed, the 'explosive growth' of mega-cities in the developing world which was predicted in the early 1980s has not generally been realised. Although there is a growing number of urban centres of unprecedented size, something under 5 per cent of the global population live in mega-cities (UNCHS, 1996). New kinds of urban systems are also developing world-wide which include networks of very dynamic, although smaller cities (see Potter et al., 1999). In short, the actual and predicted patterns of urban change in the developing world have been the subject of much analysis and debate and have proved to be highly varied even within nations and not always as expected by researchers or planners.

## Processes

The key processes of urban change in the developing world are certainly without historical precedent. In nineteenth-century Europe, people migrated to the towns and cities in search of employment and economic advancement. The industrial activities located in those areas depended on this process of migration to raise output, and generate wealth. Urbanisation, industrialisation and 'modernisation' (the adoption of urban values) were processes which occurred simultaneously in the cities of Europe, and were mutually reinforcing. This has not been the case in the developing world. Table 5.2 highlights the cases of a number of Latin American countries in the 1960s (a period of relatively rapid industrial development), where it is seen that employment growth lagged substantially behind that in manufacturing output. Such 'jobless growth' continued to be a feature of urban change in the developing world into the 1990s.

**Table 5.1** *Urban population change by region, 1970–2000*

| | *Urban population, 1985 (millions)* | *Urban population, growth rate, 1970–85 (per cent)* | *Projected urban population, 2000 (millions)* | *Projected urban population growth rate, 1985–2000 (per cent)* |
|---|---|---|---|---|
| China | 219 | 1.8 | 322 | 2.6 |
| East Asia | 46 | 4.4 | 68 | 2.6 |
| South and South-East Asia | 377 | 4.1 | 694 | 4.2 |
| West Asia | 63 | 4.6 | 109 | 3.7 |
| Latin America | 279 | 3.6 | 417 | 2.7 |
| Africa | 174 | 5.0 | 361 | 5.0 |
| Pacific | 1 | 4.2 | 2 | 4.7 |
| Total | 1,159 | 3.7 | 1,972 | 3.6 |

Source: Devas & Rakodi (1993)

**Table 5.2** *Industrialisation and employment in selected Latin American countries, 1963–9*

| *Country* | *Manufacturing annual output growth (%)* | *Manufacturing employment growth (%)* |
|---|---|---|
| Brazil | 6.5 | 1.1 |
| Colombia | 5.9 | 2.8 |
| Costa Rica | 8.9 | 2.8 |
| Dominican Republic | 1.7 | -3.3 |
| Ecuador | 11.4 | 6.0 |
| Panama | 12.9 | 7.4 |

**Figure 5.4** *The largest urban centres in Asia*
Source: UNCHS (1996)

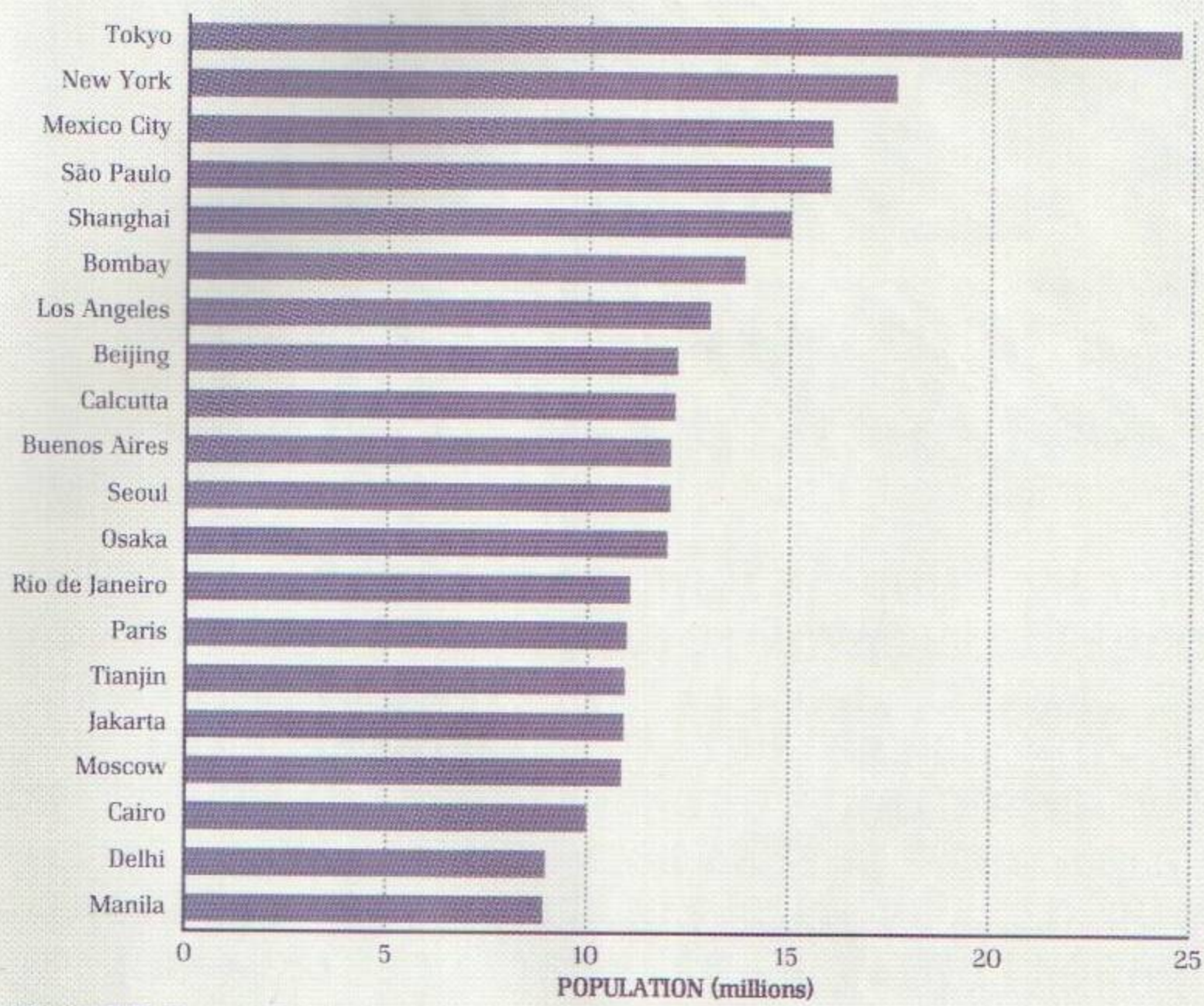


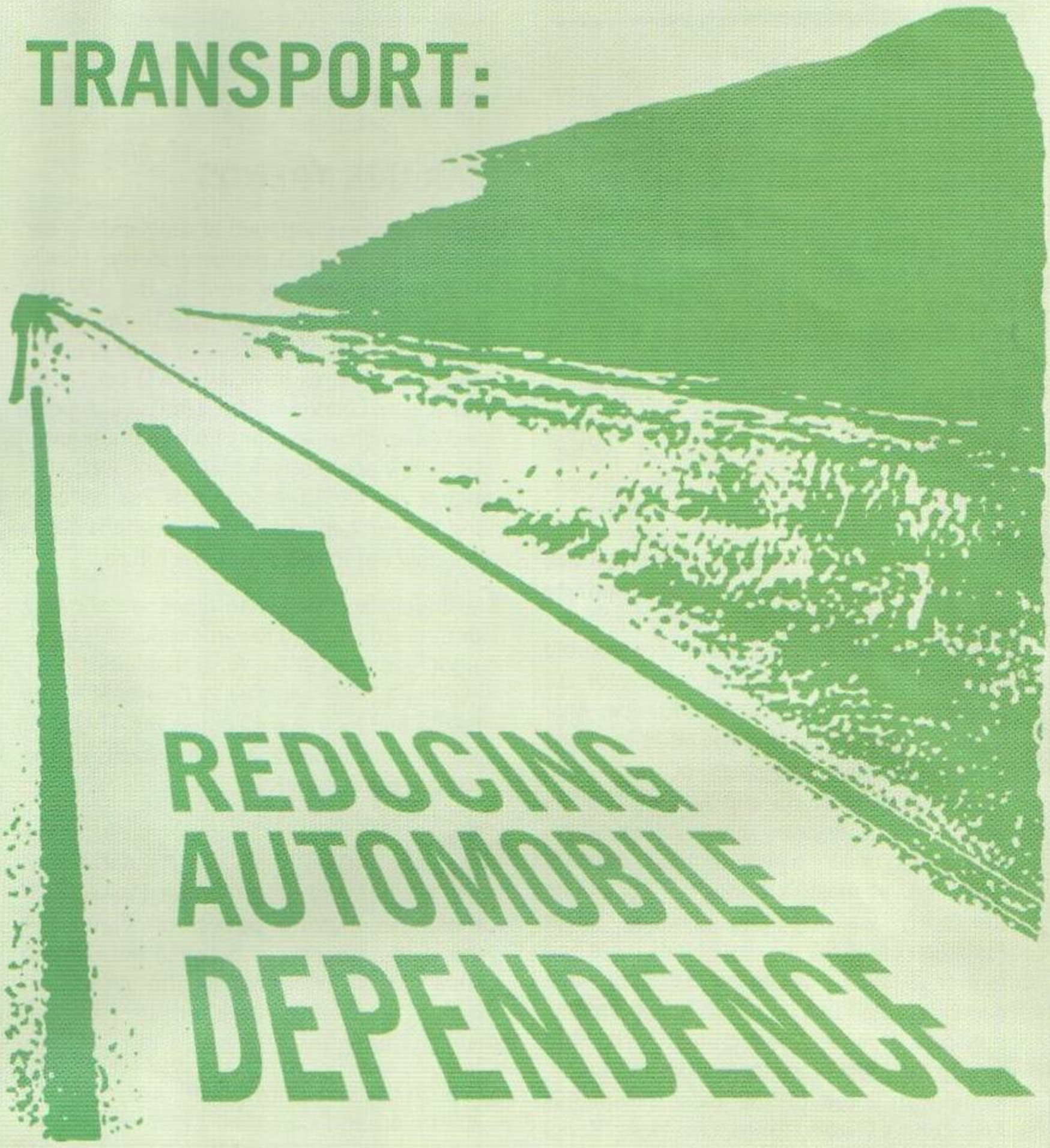

**Figure 5.5** *The world's largest urban agglomerations in 1990*
Source: UNCHS (1996)

Few of the urban poor can afford to be unemployed for any length of time. Many, in fact, will be under-employed; either they are working less than they would like or are doing so at such low rates of production that their labour could be withdrawn with very little impact on overall output. In recent years, structural adjustment programmes have also led to contraction in formal sector employment opportunities in the cities of the developing world, through the loss of jobs in the public sector and the denationalisation of industries, for example. In response to a lack of employment opportunities within this 'formal' sector, many urban residents in the developing world look to a wide variety of both legitimate and illegitimate income opportunities available within the 'informal' economy, the term used to refer commonly to small-scale, unregulated, semi-legal economic activities which often rely on indigenous resources, family labour and traditional technology. Whilst it is now appreciated that the two sectors are not wholly distinct (Drakakis-Smith, 1987), Table 5.3 shows the estimated share of urban labour force in the informal sector for a number of cities in the developing world. Clearly, in urban areas employment is critical to securing a livelihood and avoiding impoverishment and for sustained development. Todaro (1997) has suggested that one of the most 'obvious failures' of the development process over the past few decades has been 'the failure of modern urban industries to generate a significant number of employment opportunities' (p. 247).

Source: Elliot, J. A. (1999). *An introduction to sustainable development*. London: Routledge.

## APPENDIX 4: Source 6

# TRANSPORT:



# REDUCING AUTOMOBILE DEPENDENCE

**SUMMARY:** SUCCESSFUL AND WEALTHY CITIES ARE USUALLY ASSOCIATED WITH HIGH LEVELS OF AUTOMOBILE USE AND ARE STRUGGLING TO COPE WITH THE LARGE ECONOMIC, SOCIAL AND ENVIRONMENTAL COSTS THIS BRINGS. THIS PAPER SHOWS HOW SUCH CITIES DO NOT NEED TO DEPEND ON HIGH LEVELS OF PRIVATE AUTOMOBILE USE AND DESCRIBES HOW AUTOMOBILE DEPENDENCE HAS BEEN REDUCED IN MANY OF THE MOST SUCCESSFUL CITIES IN THE NORTH AND KEPT RELATIVELY LOW IN SOME OF THE WEALTHIEST CITIES IN THE SOUTH.

## INTRODUCTION

In the post-war era falling energy prices and rising car ownership have transformed cities, allowing the increased physical separation of activities and the progressive spread of urban hinterland at lower densities. The dispersal of employment, retailing and service facilities creates an equivalently dispersed pattern of trips that is anathema to public transport operation. Lower average densities mean a decline in pedestrian accessibility, longer trip lengths and reduced catchment populations for public transport routes. The result is increased car dependence, profligate energy use and global pollution.

The extent to which a city's population has become dependent on the use of private automobiles varies greatly, even for cities where the inhabitants have comparable levels of income. A detailed study of 32 major cities in North America, Europe. Australia and Asia found that the cities could be divided into five categories of automobile dependence. Most US and Australian cities were within categories one and two which have a high or very high automobile dependence and, at most, a minor role for public transport, walking and cycling. Most European cities fell into categories three and four that had moderate or low automobile dependence and an important role for public transport. However, Munich and Paris, both among the most prosperous cities in Europe, along with three of the most prosperous Asian cities (Tokyo, Singapore, Hong Kong) had a very low automobile dependence with public transport, walking and cycling more important than cars.

## TRENDS IN AUTOMOBILE DEPENDENCE

The global cities study mentioned earlier is being updated to include data for 1990. The 1980s was the first decade where it would be possible to judge the impact of the global sustainability agenda on cities in terms of their transportation. The early data are summarized in Table 8.2, showing trends.

## CAR USE TRENDS

US cities have continued to accelerate in car use per capita (2.3 per cent in the 1980s compared to 2.2 per cent in the 1970s); their 2,400 kilometres of growth per capita in the ten years to 1990 is equal to the total vehicle kilometres travelled (VKT) per capita in Paris or London in the 1980s. European and Asian cities starting from a much lower base grew only 950 kilometres and 420 kilometres per capita, though this 2.2 per cent and 3.3 per cent per annum growth is still a real concern for a sustainable future.

Australian and Canadian cities are showing an interesting trend towards reduced growth in VKT. In the 1960s, Australian cities' VKT grew by 4.5 per cent, by 2.3 per cent in the 1970s and by 1.2 per cent in the 1980s. If projected, this leads to zero growth in the 1990s (see Figure 8.3).

Toronto is similar (along with other Canadian cities in preliminary data) with just 1.6 per cent growth in the 1980s (873 kilometres of growth per capita). Figure 8.4 shows the differences between the US and other cities in terms of the growth in vehicle kilometres travelled in cars per person during the 1980s.

The reduced growth in car use in Australian and Canadian cities (especially compared to US cities) may be due to:

- **Reurbanization of older suburbs which leads to reduced travel: reurbanization in Australian cities is now more than 30 per cent and up to 50 per cent of all development; it is also very strong in Canadian cities.**
- **Development of nodal subcentres in outer suburbs that also reduce the need for travel and make transit more viable; signs of these emerging subcentres are apparent in Australia but not as much as in Canadian cities.**

- Better urban environments which encourage both the reduction in the need for car journeys to 'leapfrog' unsafe urban areas (as in US cities), and more walking and cycling.
- Less dispersion and development of highly car-dependent 'edge cities' which have been characteristic of US urban growth patterns.

**Table 8.2** *Trends in the use per person of automobiles and public transport in world cities, by region*

| Car use (vehicle kilometres travelled per person) | | | |
|---|---|---|---|
| Year | 1970 | 1980 | 1990 |
| US cities | 7,334 | 9,168 | 11,559 |
| Australian cities | 4,628 | 5,850 | 6,589 |
| Toronto | n/a | 4,807 | 5,680 |
| European cities | 2,750 | 3,798 | 4,754 |
| Asian cities | 913 | 1,067 | 1,487 |

| Public transportation (trips per person) | | | |
|---|---|---|---|
| Year | 1970 | 1980 | 1990 |
| US cities | 48 | 57 | 64 |
| Australian cities | 118 | 93 | 91 |
| Toronto | 154 | 202 | 210 |
| European cities | 249 | 290 | 359 |
| Asian cities | 454 | 430 | 496 |

Sources: ESCAP. *State of Urbanization in Asia and the Pacific 1993*, Economic and Social Commission for Asia and the Pacific, ST/ESCAP/1300. United Nations, New York, 1993; Kenworthy, Jeff. Paul Barter, Peter Newman and Chamlong Poboon (1994), 'Resisting automobile dependence in booming economies; a case study of Singapore, Tokyo and Hong Kong within a global sample of cities', paper presented at the Asian Studies Association of Australia Biennial Conference, 1994. Murdoch University, Perth; and Urban Redevelopment Authority (1991), *Living the Next Lap: Towards a Tropical City of Excellence*, Singapore.

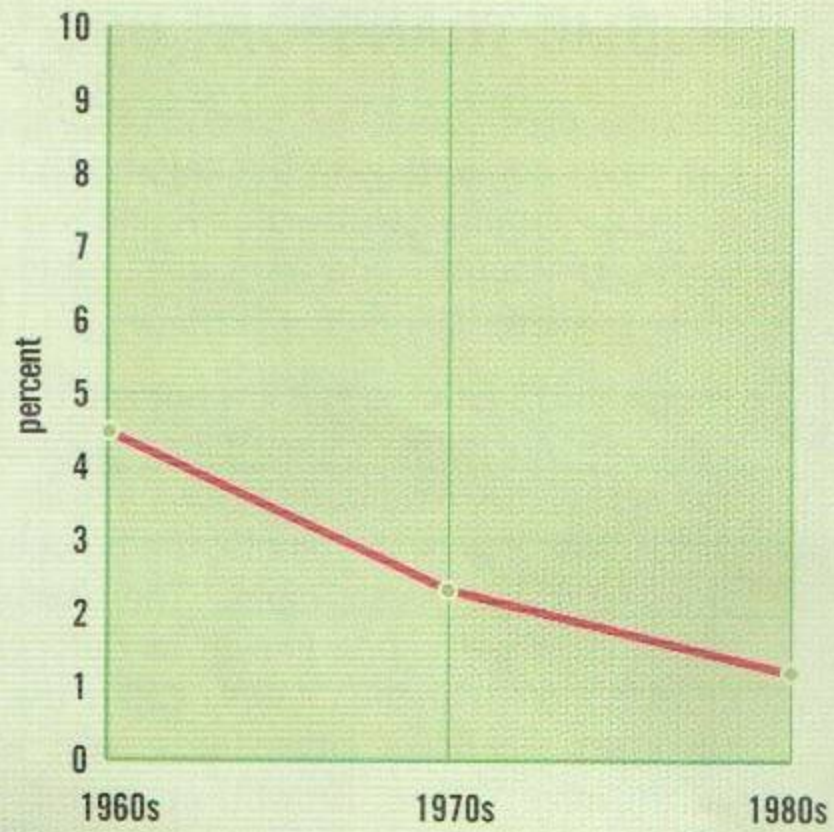



**Figure 8.3** *Average increase in car use (vehicle kilometres travelled per capita) in Australian cities*

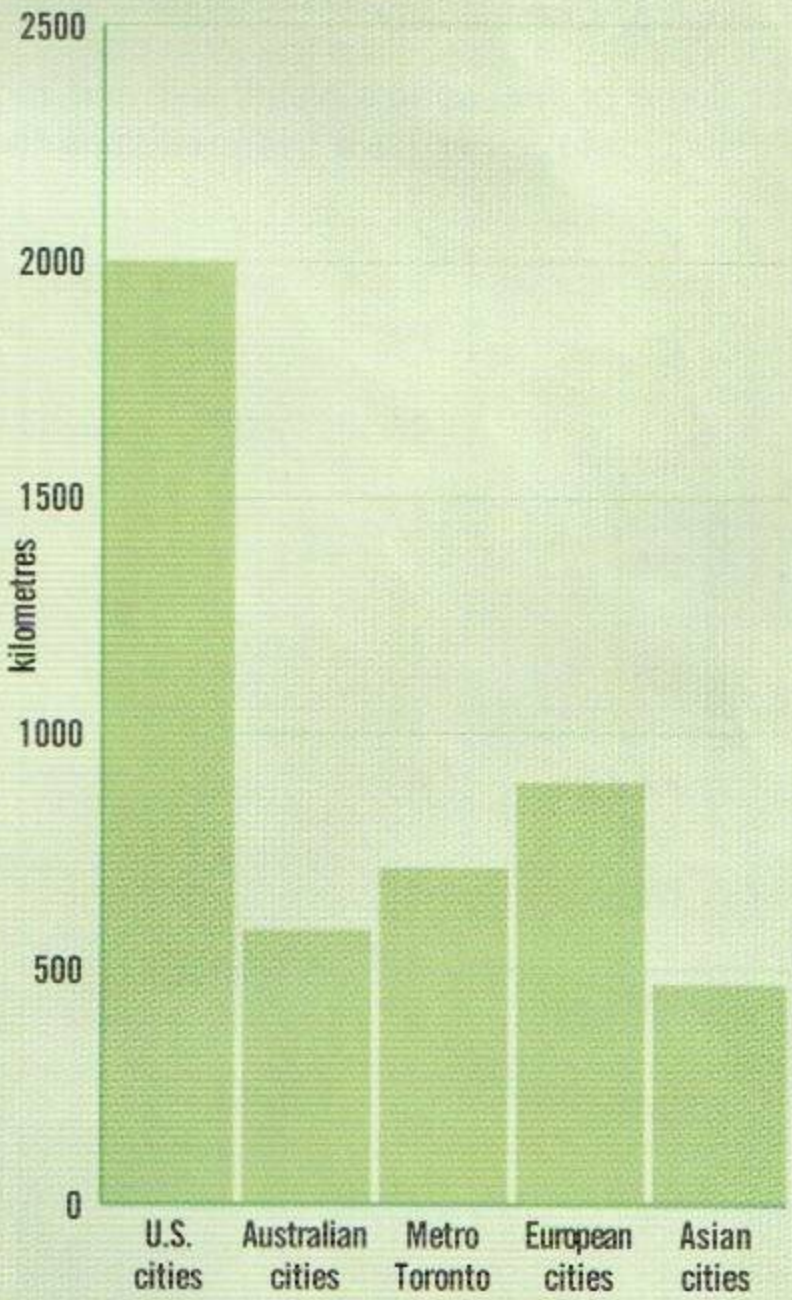



**Figure 8.4** *Increases in car use (vehicle kilometres travelled per capita) in global cities, 1980–1990*

## PUBLIC TRANSPORT USE

Despite predictions by Lave that transit can never compete with the car and that it is in a terminal state of decline everywhere, the actual data from most cities is quite positive (see Figure 8.5).

Transit in US cities is still low but is growing again. In Australian cities it has stabilized and indeed may have started growing again in the 1990s. It grew in Toronto, the European cities and the Asian cities. The average transit trips per capita growth in European cities is more than the total per capita use in US cities. In Asian cities the growth was much more again. Growth in transit in European cities is accelerating (2.1 per cent in the 1980s compared to 1.5 per cent in the 1970s). Such trends are a positive sign of sustainability.

Some of the world's wealthiest and most successful cities have been reducing their citizens' dependence on private automobiles. This can be seen in a comparison between Los Angeles, Zurich and Singapore on how their car use and transit use changed between 1980 and 1990. In Los Angeles, car use continued to grow rapidly, with a decline in the use of public transit, whereas in Zurich and Singapore there was far less growth in car use and a considerable increase in the use of public transit. Thus, the substantial increases in income which have occurred in the past ten years in Zurich and Singapore have gone mostly into public transit use and not into private car use and this reflects their cities' overall plans and priorities to achieve this. Los Angeles, on the other hand, has not attempted to control automobile dependence; here, it is accepted that there is a culture which has little belief in planning other than the facilitation of individual mobility. The use of private automobiles has almost inevitably grown as a result.

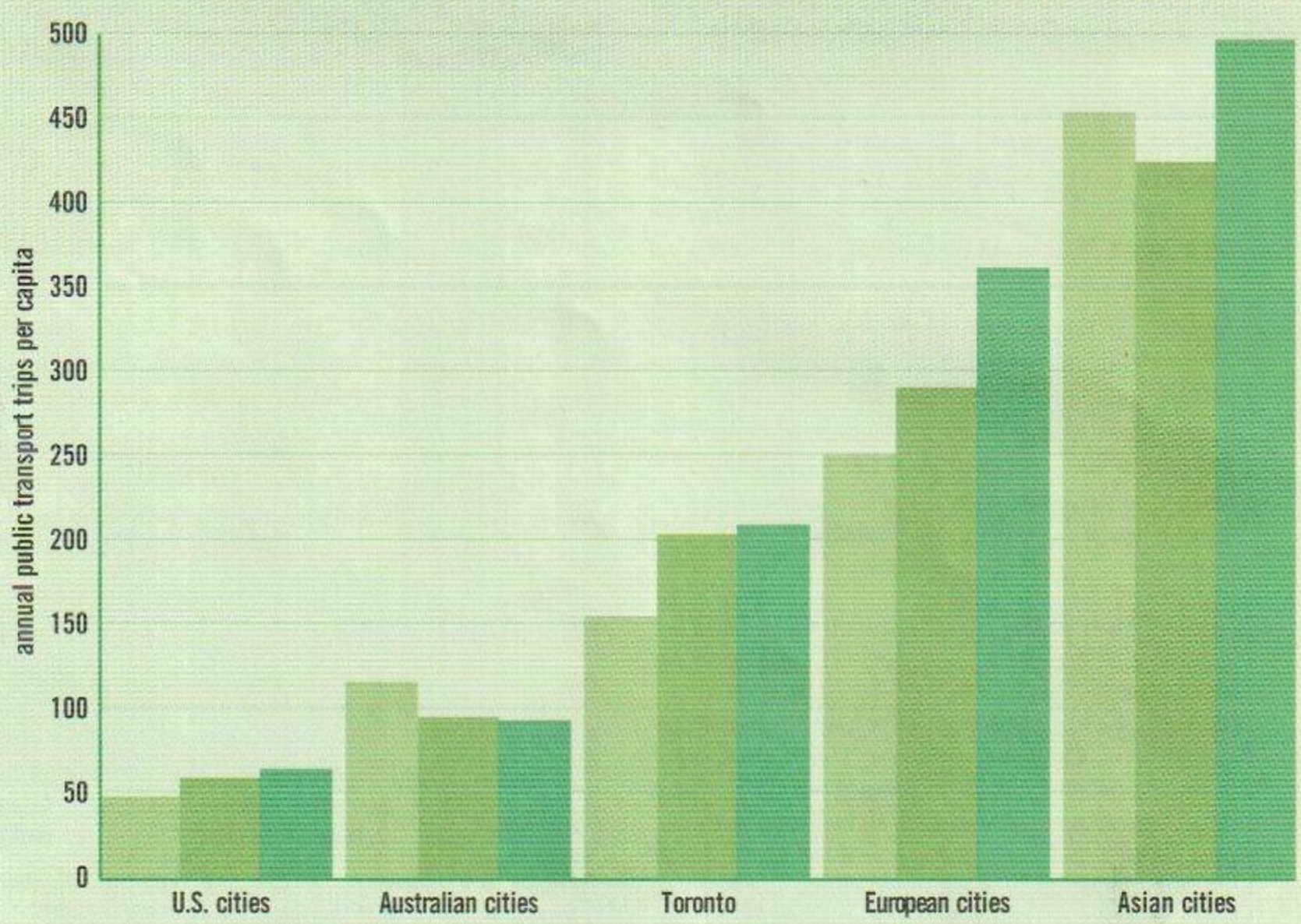



**Figure 8.5** *Trends in per capita public transport use in world cities by region, 1970–1990*

## THE ASIAN CITIES STUDY

We are conducting a more detailed study of the sustainability of seven Asian cities. This is being done partly for the World Bank to highlight further the question of transportation priorities and their link to land use and infrastructure as well as the role of personal income in shaping these patterns. Table 8.3 contains the preliminary data. The data indicate the following:

There is little obvious relationship between automobile travel patterns and income. Hong Kong, Singapore and Tokyo average 13 per cent of the car use of US cities despite having much higher wealth levels (average of 44 per cent, with Tokyo being 77 per cent of US cities). Their wealth is much more directed into transit, which is on average eight times US levels. Bangkok, Kuala Lumpur, Jakarta and Surabaya have only 10 per cent of US incomes and are thus much poorer than Tokyo, Singapore and Hong Kong. On the other hand, transit use is generally underdeveloped compared to the richer Asian cities (about half of Manila is not considered – see below). These are the cities (especially Bangkok) where traffic levels are major economic and environmental issues. Thus, it appears that their wealth is being converted into automobile use on the American model in these cities rather than into transit as found in the Singapore, Tokyo and Hong Kong model. Manila has a very high transit use with its Jeepney system, though its 727 trips per capita is not as impressive when compared on a passenger / kilometre basis, as most trips are very short. As car use grows it is increasingly difficult for transit to remain competitive, thus Manila is preparing to build more segregated electric rail services.

**Table 8.3** *Transportation infrastructure and land use in seven Asian cities, 1990.*

| | Tokyo | Singapore | Hong Kong | Manila | Bangkok | Kuala Lumpur | Jakarta | Surabaya |
|---|---|---|---|---|---|---|---|---|
| City median income (US$ 1990) | 38,229 | 12,860 | 15,077 | 3,058 | 4,132 | 6,539 | 1,975 | 1,975 |
| and % of US | 77% | 26% | 30% | 6% | 8% | 13% | 4% | 4% |
| Car use per person (km) | 2,103 | 1,864 | 493 | 860 | 1,562 | 2,687 | 383 | 237 |
| and % of US car use | 19% | 17% | 4% | 8% | 14% | 24% | 3% | 2% |
| Public transport use per capita (trips per year) | 461 | 457 | 570 | 727 | 340 | 337 | 206 | 122 |
| % of motorized trips by public transport | 62 | 72 | 89 | 73 | 31 | 30 | 47 | 29 |
| % of all trips by walking and cycling | 45 | n/a | n/a | 30 | 14 | 20 | 43 | 25 |
| Length of road (metres per person) | 19 | 1.0 | 0.3 | 0.6 | 0.6 | 1.5 | 0.5 | 0.3 |

Source: Kenworthy, Jeff; Paul Barter; Peter Newman and Chamlong Poboon (1994), 'Resisting automobile dependence in booming economies: a case study of Singapore, Tokyo and Hong Kong within a global sample of cities', paper presented at the Asian Studies Association of Australia Biennial Conference 1994, Murdoch University, Perth; and Urban Redevelopment Authority (1991), *Living the Next Lap: Towards a Tropical City of Excellence*, Singapore

Jakarta and Surabaya have comparatively very little car use but also the lowest level of transit use. Traffic issues are generally leading to higher automobile infrastructure rather than to more transit. These Indonesian cities are faced with a future like Bangkok's if they continue down that path.

- In peak periods, when road space is at a premium, cities such as Tokyo, Hong Kong, Singapore and Manila average 74 per cent of motorized work trips on transit. On the other hand, Bangkok, Kuala Lumpur and Surabaya have a mere 30 per cent, highlighting a growing difference in transportation priorities in these cities. Jakarta is between these two groups with 47 per cent.

- Modal split patterns also vary in interesting ways. Wealthy Tokyo has a very large 45 per cent of all trips on foot and by bicycle, while much poorer Bangkok and Kuala Lumpur have only 14 per cent and 20 per cent respectively. Traffic in Bangkok is now so bad it makes any walking or cycling almost impossible. Private transportation accounts for over 50 per cent of total trips in Bangkok and Kuala Lumpur, while in Tokyo it is only 27 per cent. In Surabaya, the least wealthy of all the cities, 47 per cent of trips are now by private transportation (particularly motorcycles) and walking and cycling has fallen to 35 per cent, down from 53 per cent in 1980.

- All these Asian cities have land-use structures that are built for transit and walking rather than for automobiles. Those cities opting to facilitate automobile use rather than transit are showing all the signs of an inherently dysfunctional system. They also have a much better chance of coping with a world where automobile dependence must be overcome (including the sustainability agenda to reduce fuel use and greenhouse gas production) than US and Australian cities. They just need to invest in the transit/cycling/walking infrastructure. US and Australian cities must also restructure their urban form.

## SOLUTIONS TO AUTOMOBILE DEPENDENCE

National and city governments in both the North and the South are questioning the future of cities and urban systems in which private automobiles have the central role in the transport of people. This stems from a greater recognition of the economic, social and environmental costs of 'automobile-dependent' cities that were described above. Solutions to automobile dependence are thus being sought across the globe.

Automobiles and trucks can be 'civilized' through technological advances that greatly reduce fuel use and polluting emissions and increase safety both for the vehicle users and for other road users. Sophisticated traffic management systems can increase efficiency in the use of road spaces and the number of vehicles using road systems without congestion. But, increasingly, even if the incorporation of these advances was accelerated, it is seen as insufficient as the sheer volume of cars, trucks and other motorized road vehicles overwhelms cities. This is especially so in high-density cities that have a low proportion of their total area devoted to roads, as in many cities in Europe and in the South. Seeking to expand road systems to cope with projections of increased automobile use in high-density cities also disrupts the urban fabric and displaces large numbers of people. It was the scale of this disruption in cities in the North that helped to generate a re-evaluation of the priority that was being given to private automobile users. For many of the major cities in the South, the number of automobiles is growing much more rapidly than the number of people, and building the roads and highways to cope with projections for increased automobile use will mean the displacement of tens of thousands (or more) people in each such city. There is also the more recent recognition that

people who do not have access to a car are significantly disadvantaged as automobile dependence within a city or region increases since this also leads to a deterioration in public transit and a city in which access to workplaces, schools, shops and services is increasingly difficult without a car.

Despite the doubts as to whether the use of private cars can be controlled, not least because of the power of the economic interests behind the automobile-dependent model, there is a growing awareness of the need to plan to reduce automobile-dependence within cities. Many cities have pedestrianized their central districts; for most, this was easily done as these were historic city centres that originally developed as 'walking cities' before the advent of motorized transport. But there are also many examples of cities which have reduced automobile dependence through innovations in public transit and controls on automobile use in both the North and the South. They include Hong Kong, Singapore and Surabaya in Asia, Curitiba in Latin America, Zurich, Copenhagen and Freiburg in Europe, Toronto and Portland in North America and Perth in Australia, and the means by which they achieved this are outlined below. The fact that this list includes some of the wealthiest cities in both the North and South shows that reducing automobile dependence is possible even in societies with high levels of automobile ownership.

There is also much discussion about the need for public transit-oriented development as the basis for any sustainable city. The link with sustainable development comes from the fact that there is a rapid growth in the number of automobile-dependent cities and in most of these cities, automobile dependence is still increasing. The world's consumption of fossil fuels and total emissions of greenhouse gases would increase dramatically if the whole world's population came to be as automobile dependent as North America, Western Europe or Australia. The OECD and the World Bank have begun to recognize this and are stressing how transport funding needs to be more critically evaluated. But, in a globally connected world, the reduction of automobile dependence (and its associated energy use, resource use, air pollution and greenhouse gas emissions) should be directed both to cities where automobile dependence is highest and to cities in the South where short-term and long-term measures can reduce their automobile dependence while also enhancing their prosperity and quality of life.

## KEY POLICY CONCLUSIONS

Four key conclusions of relevance to public policy can be drawn from the data on cities around the world as to how automobile dependence can be reduced:

- ***Public transport infrastructure*** **– investment in transit infrastructure can help to shape the city as well as ease traffic problems – for instance, encouraging 'walking cities' to develop around light railway or rapid busway stations. There is a considerable range of technological options too, varying in price, capacity and speed and these include options such as express busways that do not require heavy investments. It is also possible to 'upgrade' as demand rises and as cities grow in size and wealth – for instance, as light railways or trams replace express busways. It is also possible to draw on private sector resources – for instance, through city authorities providing the framework within which private bus companies bid for particular routes or areas. But this can only be achieved if public transit is part of a broader policy that discourages low-density developments and unnecessary automobile use. If public transit is left as a supplementary process in streets designed for the automobile, there will be no resolution of the transport dilemma.**

- *Pedestrian/cycle orientation* – if the goal is to provide for the most efficient, equitable and human form of transport, this means a city with provision for cycling, good walking space on streets and in public squares, and traffic-free shopping streets. Any city that neglects this dimension will find social and economic problems as well as the obvious environmental ones.

- *Density* – the need to maintain land-use efficiency is linked closely to transport. Dispersing land uses at low density creates automobile dependence. Dense urban villages linked by public transit creates the opportunity for 'walking city' and 'transit city' characteristics to be introduced into the automobile-dependent city (see Figure 8.5, which should be compared to Figure 8.2). Similarly, introducing new and efficient public transit lines into rapidly growing cities can encourage the development of such dense urban settlements and limit low-density sprawl, especially if land-use planning helps to encourage such developments.

- *Planning and control* – all three of the above policies have strong market pressures behind them. But they also require planning to facilitate them. This planning is not heavy-handed bureaucracy but an expression of any city's cultural values, and also of the needs and priorities of pedestrians and cyclists and of children, youth and all other citizens who cannot or do not use cars. All cities have some commitment to this social value. If automobile dependence is not resisted through conscious planning, it will erode or help to destroy most attempts to maintain community life in an urban setting. For all cities, but particularly those in the South, strong neighbourhoods need to be protected from the dispersing and disruptive aspects of the automobile, while in many cities in the wealthiest market economies of the world, the policy of reducing automobile dependence is part of a process to reclaim residential neighbourhoods.

Source: Newman, P. (1999). Transport: reducing automobile dependence. In D. Satterthwaite (Ed.), *The Earthscan reader in sustainable cities* (pp. 67–92). London: Earthscan Publications.

# APPENDIX 5: Compiling a bibliography

## A book – single author

last name comma one space
year brackets full stop one space
initial full stop one space
title of book – *italics* full stop one space
place of publication colon one space

Milroy, L. (1980). *Observing and analysing natural language*. Oxford: Basil Blackwell.

publisher full stop

## A book – more than one author

last name comma one space
ampersand
initial full stop one space
last name comma one space
initial full stop one space
year brackets full stop one space
title of book – *italics* full stop one space
place of publication colon one space

Chambers, J. & Trudgill, P. (1980). *Dialectology*. Cambridge: Cambridge University Press.

publisher full stop

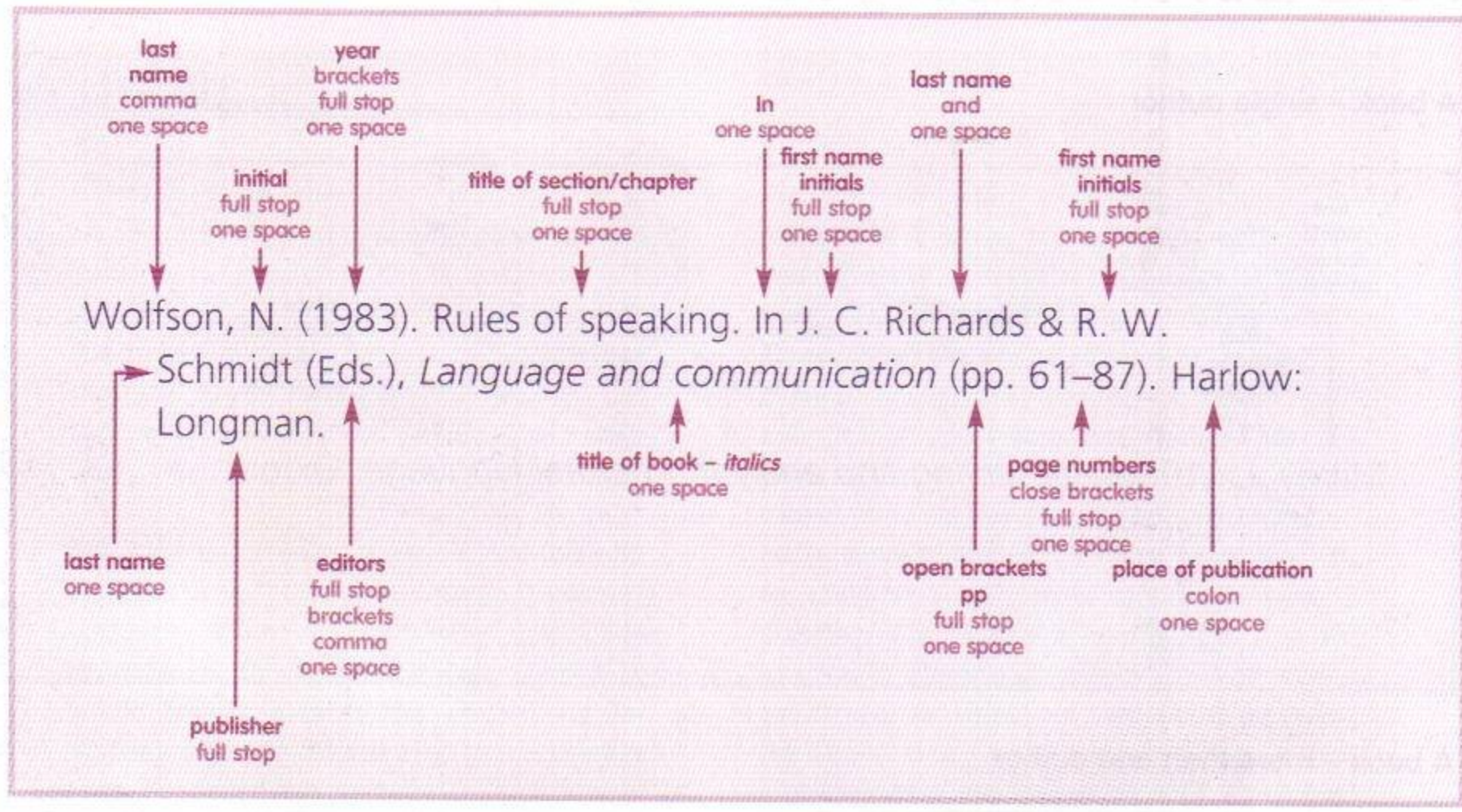
## A journal article

last name comma one space
year brackets full stop one space
initial full stop one space
title of article full stop one space
title of journal – *italics* comma one space

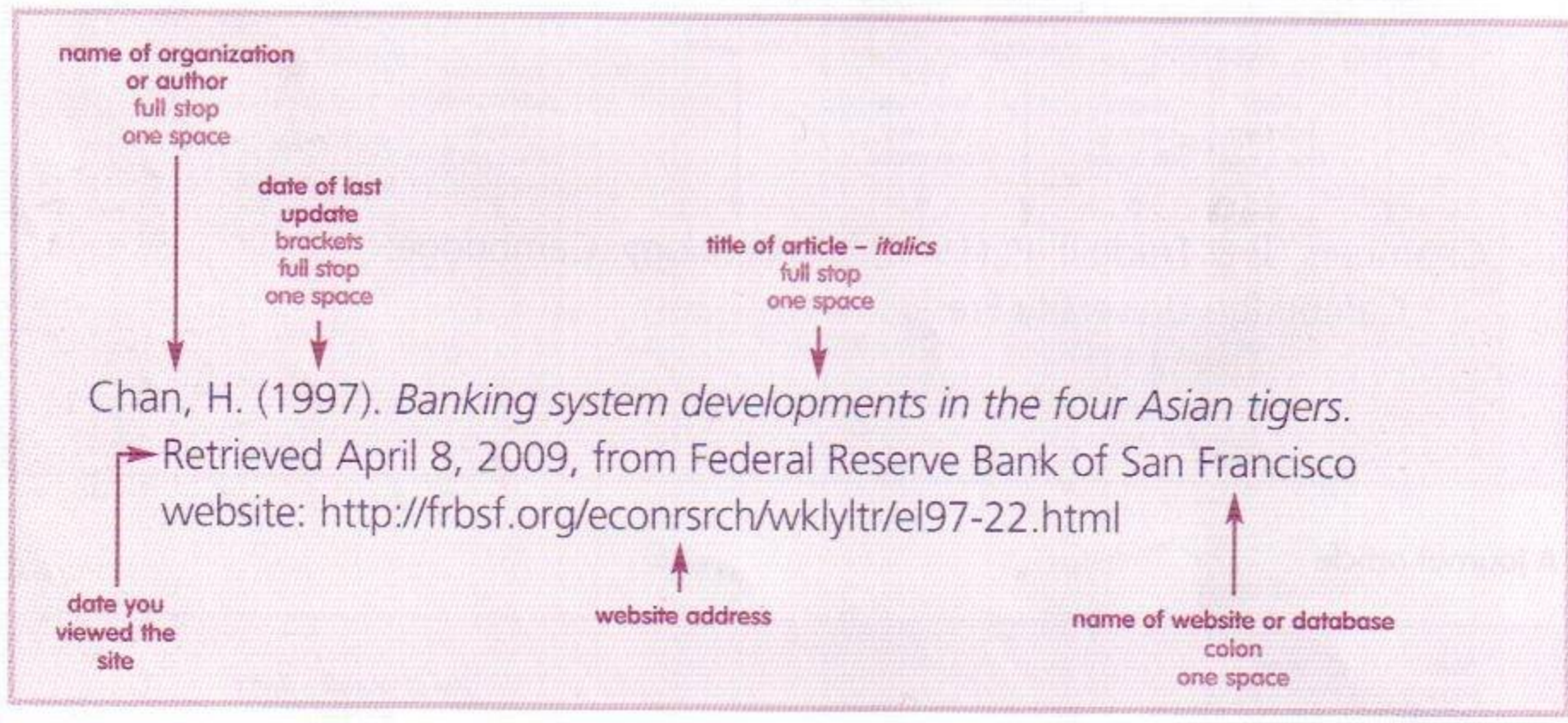
Bell, A. (1984). Language style as audience design. *Language in society*, *13*(2), 145–204.

volume no. – *italics* issue no. brackets comma one space
page numbers full stop

### A section or chapter of a book




### An internet site



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Joan McCormack works as an EAP lecturer and Course Director at CALS, as well as running the Self-Access Centre for Language Learning. She has spent time teaching in Japan, Peru and Spain, and has been working in the field of EAP for the past 14 years at the University of Reading. She is particularly interested in how best to approach the teaching of extended academic writing skills, and in working with students to increase their confidence when engaging in discussions in an academic environment. She has co-authored two books for Garnet Education: *EAS Speaking* and *EAS Extended Writing & Research Skills.*

John Slaght has worked at the University of Reading in a variety of capacities since 1988 and now works as Course Director and Language Assessment Coordinator in the Centre for Applied Language Studies. John has considerable overseas experience in higher education, having spent 14 years teaching in Africa and the Middle East. His university work continues to provide him with extensive travel to many parts of the world. He has co-authored two books for Garnet Education: *EAS Reading* and *EAS Extended Writing & Research Skills.*

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